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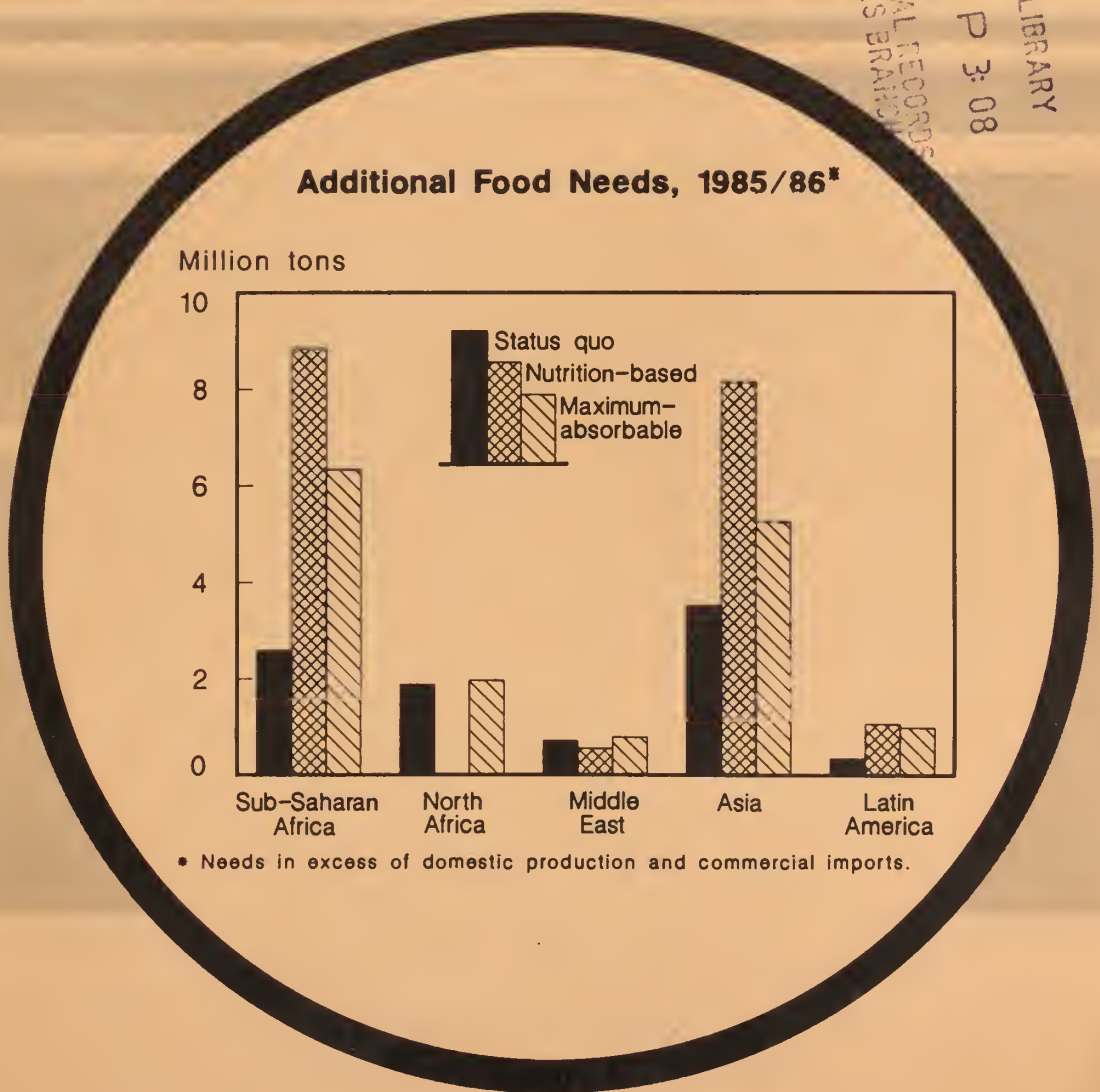

PREFACE

As a result of a Presidential Initiative in the summer of 1984, an Interagency Food Aid Analysis Working Group was established to provide the U.S. Government with the best possible assessment of food needs in the developing world. This fall update issue of World Food Needs and Availabilities, 1985 is prepared under the aegis of the Interagency Working Group.

The assessment of food need levels has serious implications for both donor and recipient countries. The assessment exercise has the potential to influence the expenditure of many millions of dollars and affect the lives of many millions of people.

It is, therefore, very important that readers of this report have clearly in mind both the issues which the Food Needs and Availabilities report purports to address, and those issues which it does not address. This report is not an allocation or programming document, rather it is an objective analytical assessment of food needs. Allocation and programming decisions are made in other forums and consider factors in addition to the assessment of food needs presented in this report.

What, then, is the issue addressed by this report? The assessment of food needs presented herein refers to the amount of food needed to cover the difference between a country's domestic food production plus its commercial import capacity, and either of two alternative measures of food need.

The status quo need is based on a country's recently achieved levels of food consumption, while the nutrition-based need is based on FAO's published information on minimum recommended dietary intake for each country. In addition, an estimate is made of the maximum absorbable imports if the highest historical levels of per capita total food use and carryover stocks were to be maintained. This assumes the food delivery systems in most food-aid-recipient countries have been "at capacity" at the highest historical level. None of these measures, taken individually, is an adequate reflection of the range of objectives embodied within P.L. 480 legislation, nor does any one measure capture 811 factors considered in allocation and programming decisions.

The food need levels reported are for the crop year 1985/86 and 1986/87. As with any projection, assumptions must be made about future events. The assessment of food needs is based heavily upon the projections of food crop production and financial ability to commercially import food. Food production is subject to the vageries of weather and commercial import capacity is influenced by various international commodity and financial market conditions. Neither weather nor international markets can be predicted with certainty. For this reason, the food need levels contained in this report are subject to change.

To reflect the current crop conditions and import capacity, each country will be reviewed quarterly and an updated food needs level calculated for those countries judged to be facing conditions significantly different from those upon which this report is based. For this reason, readers are encouraged to acquire current reports to keep abreast of changing food need levels. Readers are further advised that both the methodology and the data used in the calculations are continually being upgraded. This effort reflects the commitment of the U.S. Government to respond more rapidly and adequately to the needs of those countries where food commodity assistance can be used for humanitarian purposes and in the mutual interests of the recipient country and the United States Government.

WORLD FOOD NEEDS AND AVAILABILITIES, 1985

UPDATE

NOVEMBER

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FOREWORD

This is the first of three supplements to the annual World Food Needs and Availabilities (FNA) published in July. The annual report and supplements serve both the requirement of Public Law 480, as amended, that "global assessments of food production and needs" be submitted to the Congress, and the food needs analysis function of the Food Aid Analysis Working Group. Information provided through these reports to the Executive Branch and the Congress is employed along with other information in making tentative fiscal 1986 and 1987 food aid budget allocations. The July report, and the supplements are intended to serve the additional purpose of providing detailed updates on food supplies and additional food needs on both a country-by-country and a world basis. This information is also useful to program and policy officials within donor governments and food-aid-recipient countries, analysts in international organizations and universities, and private agencies involved in food aid distribution. The assembly and maintenance of data for the analysis of food needs is a joint effort of the U.S. Agency for International Development (AID) and USDA.

This report covers 28 of the 69 countries included in the 1985 annual report. These countries were chosen for inclusion on the basis of prospects for change (at least a shipload) in the estimated additional food needs. Five other countries (Guinea, Sierre Leone, Angola, Haiti, and El Salvador) were analyzed and found to have no significant change in foods needs. Several countries having large changes in agricultural production or financial status but little change in additional food needs were included for information purposes. The effect of changes in nations' additional food needs on regional and total needs is discussed in the Summary.

This supplement, like the annual report, presents two alternative measures of the overall food import requirements (commercial plus concessional) and the additional food needs of each country for 1985/86 and 1986/87. It also provides an assessment of maximum quantities of food imports a country can physically absorb. This information can be critical in countries with food crises or countries trying to advance the nutritional status of their population. For some of these countries, provision of full nutrition-based needs cannot be attempted because of inadequate port, transportation, or storage facilities.

The status quo and nutrition-based assessments are based on two different sets of normative judgments and assumptions regarding the role of additional food and the considerations that might govern its use. The basic assumption underlying the status quo assessment is that additional food would be needed to prevent food supplies, and hence consumption, from falling below recently available levels. Meeting status quo food needs would stabilize per capita consumption by filling shortfalls in domestic production and import capacity.

The most current available weather, crop production and financial data were employed in preparing this quarterly supplement. In making needs assessments for the 28 countries in the July report, where seasonal weather patterns made crop forecasts tentative, normal weather was assumed for the 1985/86 crop year. This is the only reasonable crop estimate that can be made in May when the additional food needs assessments for the July report are calculated. Estimates of commercial import capacity still assume the continuance of recent experience in debt payment, and thus the availability of foreign exchange for commercial food purchases.

The nutrition-based assessment addresses the continuing problem of undernutrition in many of the developing countries. The assumption made in this assessment is that additional food would be needed to close the gap between food availabilities and an internationally accepted minimum nutritional standard. The nutrition-based needs estimates thus provide a measure of the nutritional gap, net of recipient countries' capacity to import food commercially.

Neither of the food needs measures deals specifically with the ability of a country's infrastructure to absorb food aid without overloading port and transportation capacity, and storage and distribution systems. The maximum absorbable food imports assessment, included in the reports for the first time this year, measures the capacity of a country to utilize additional food imports to increase per capita consumption and food stocks. This measure frequently limits the quantity of nutrition-based needs that can physically be provided. The "gap" between maximum absorbable and nutrition-based food needs is one measure of the seriousness of a country's food problem. In a very real sense, the magnitude of the task of achieving the financial and the physical capacity to import food, or increasing domestic food production consistent with national food demand, is captured by this measure.

The import requirements and additional food need estimates in World Food Needs and Availabilities reports are based on national agricultural and economic data. These estimates assist financial and logistics planning by both donor and food aid recipient countries. It should be apparent, however, that additional food needs levels are only a part of the calculus, and that delivering imported food to the communities that are deprived by national food production shortfalls or civil disturbances is a major undertaking. Factors bearing on success include local transportation and communications infrastructure, the financial status of both local and national public service agencies, and the availability of international financial support. The quarterly assessments of additional food needs are intended to decrease the likelihood that the seriousness of a disaster will be underestimated, and that food aid and complementary financial and technical assistance is provided in a timely fashion.

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Food Needs Analysis Coordinator

ACKNOWLEDGMENTS

Ray Nightingale directed the overall planning and preparation of the report. Regional coordination within the Economic Research Service was performed by: Margaret Missiaen (Africa), Rip Landes (Asia), and Cris Bolling (Latin America). Automation and programming responsibilities, including the implementation of new software for computation and document preparation, were handled by Suzanne Marks and David Stallings. Nancy McKaig, Leslie Ross, Ricardo Krajewski and Richard Shelton provided support in running the country food needs model.

The International Economics Division economists providing analysis for the report included: Chris Bolling, Richard Brown, Mary Burfisher, Cheryl Christensen, Amjad Gill, Stephen Haykin, Rip Landes, Margaret Missiaen, Art Morey, Richard Nehring, John Parker, Gerald Rector, Peter Riley, Stacy Rosen, Leslie Ross, Nydia Rivera-Suarez, David Skully, Mark Smith, David Stallings, and Larry Witucki. Contributers and reviewers from the Foreign Agricultural Service included: Patricia Haslach, Andy Aaronson, Ed Cissel, Alan Riffkin and Frank Coolidge.

Deloris Midgette assumed primary responsibility for typing the report. Other statistical assistants and secretaries who helped prepare the report included Betty Acton, Tracie Burnette, Rhodia Ewell, Jamesena George, Denise Morton, Mary Oliver, Regina Reid, and Alma Young.

Food Aid Analysis Working Group reviewers for the Agency for International Development included David Rhoad, Forest Duncan and Patricia Rader, Bureau for Food and Voluntary Assistance, Henry Merrill, Africa Bureau, Raymond Hooker and Tridib Mukherjee, Asia Bureau, and Dwight Steen, Latin America Bureau. Jack Tucker reviewed the report for the Department of State.

Rip Landes, John Link, Margaret Missiaen, and Mervin Yetley assisted in final review of the report. Diane Decker was the USDA Economics Information Division editor.

Reviewed and approved by the World Agricultural Outlook Board

SUMMARY

The detailed country tables and narratives in this report include information on the quantities and dollar values of assessed additional food needs, including the need for cereals, pulses, vegetable oils and dairy products. This summary covers just additional need for cereal, the principal commodity employed in international food aid.

Adjustments to 1985/86 additional cereal needs reported in July

Sub-Saharan status quo additional cereal needs for 1985/86 are now assessed at 2.56 million tons, down 1.65 million tons from July. An 80,000-ton increase in North Africa nets a 1.57-million-ton decrease in additional needs for Africa overall. The small change in North Africa masks a large production-based decline in needs in Tunisia and a finance-based increase in Egypt.

The decline in assessed Sub-Saharan needs was mostly in East Africa (1.4 million tons) where cereal crops have made a greater recovery than anticipated in July. However, countries in all regions showed sustained or improved production prospects over the past 3 months.

In South Asia, the current assessment places 1985/86 status quo needs 900,000 tons below the July figure. The reductions come in Pakistan and Bangladesh come primarily from improved production prospects. However, in Southeast Asia, the estimate of additional needs is higher, resulting from lower estimates of 1985/86 corn production and a deteriorating financial outlook in the Philippines.

The review of Latin America resulted in a 536,000-ton reduction in 1985/86 status quo additional needs. The reduction was principally in Peru, where greater exports and increased foreign reserves improved commercial import capacity.

Sub-Saharan nutrition-based additional cereal needs for 1985/86 are now assessed at 8.8 million tons, 170,000 greater than in July. In Latin America, the current assessment reduced nutrition-based needs by 535,000 tons. In South Asia, the reduction was 720,000, while Southeast Asia is assessed 355,000 tons greater.

Current comparisons between 1984/85 and 1985/86 assessed additional food needs

Taking into consideration the July-October changes in assessed 1985/86 levels of status quo additional food needs, the 69 FNA countries will require 9 million tons of cereals in excess of estimated commercial import capacity to maintain consumption at existing (status quo) levels. This is 2.4 million tons less than assessed needs for

1984/85. To meet minimum 1985/86 nutritional needs, the 69 countries will require a further 9.6 million tons of cereals. Total nutrition-based needs in 1985/86 of 18.6 million tons are 7.3 million tons less than assessed for 1984/85. Stock rebuilding would require 860,000 tons in addition to consumption needs. However, because of physical restraints, the countries will be able to absorb only an estimated 15.3 million tons. The maximum absorbable 1985/86 additional food aid needs for Sub-Saharan Africa are now assessed at 6.3 million tons. In Latin America, the maximum is 1 million and in Asia it is 5.2 million tons.

Additional status quo 1985/86 cereal needs in Africa are now projected at 4.5 million tons, down from 7.8 million in 1984/85. Status quo needs in the entire Sub-Saharan region dropped 46 percent, from 4.8 million tons to around 2.6 million. In East Africa, crop failures and civil disturbances have generated needs of 980,000 tons, down 40 percent from a year earlier. Needs are down 770,000 tons in Southern Africa, 690,000 in West Africa, and 1.1 million in North Africa, while Central African requirements have declined only 90,000 tons. Stock rebuilding would add 530,000 tons to Africa's total status quo needs, with East Africa requiring a further 445,000 tons. As discussed in the country narrative reports, some of these stock building needs may be served by carryover of cereal aid delivered in 1984/85.

Status quo additional needs in Asia, at 3.5 million tons in 1985/86, are up 1.2 million tons from the 1984/85 estimated needs. Sharply improved harvests in India have significantly reduced additional needs, but needs have increased in Bangladesh and Pakistan. While the current assessment has increased requirements in the Philippines, these are still lower than for 1984/85. Overall, Asian stock adjustment requirements still are low relative to additional food needs.

Latin American status quo additional cereal needs are 1.1 million tons below 1984/85. Total status quo requirements of 347,000 tons reflect improved commercial import capacity resulting from larger financial reserves. This is mainly a consequence of reduced payment on outstanding debt rather than reduced indebtedness. Debt-service payments will be high even if countries reschedule their debt to the same extent as in previous years. South American stock adjustment requirements are high relative to food needs.

On a nutritional basis, the total assessed needs of 18.6 million tons are down sharply from 1984/85's 26 million tons. Much of this decline is due to the greatly improved food situation in Asia. But, as in the status quo assessments, India's reduced needs are partially offset by heightened needs in Pakistan. Total nutritional needs in South Asia are estimated at 6.6 million tons, down from 10.4 million tons in 1984/85. Southeast Asian nutrition-based additional food needs are down 1 million tons. Additional nutrition-based food needs have risen in some African countries. Sub-Saharan nutrition-based needs are 8.8 million tons, compared to 13.4 million tons in 1984/85. Latin America's 1985/86 nutrition-based needs are down 1.1 million tons from 1984/85 to 1 million tons.

In many regions, nutrition-based needs are constrained by absorptive capacity. This is particularly significant in West, East, and Southern Africa, in South Asia, and in the Caribbean. Individual countries in which this constraint is of major importance are Ethiopia, Mozambique, Bangladesh, and Bolivia.

During 1984/85, donor countries shipped nearly 12 million tons of cereal food aid, surpassing for the first time the 10-million-ton target set by the World Food Conference in 1974. Of this, the United States supplied 60 percent, followed by the EC (with 20 percent), Canada (less than 10 percent), and Australia (less than 5 percent). Almost 90 percent of this aid, or more than 10.5 million tons, was distributed to low-income, food-deficit countries, more than half of which were in Africa.

The PL 480 program level for 1984/85 was $2.2 billion, with $1.1 billion targeted for Title I/III. Title II shipments included, for the first time, stocks from the Food Security Wheat Reserve. The PL 480 program level for fiscal 1986 has yet to be finalized. The Administration's proposal is $1.7 billion ($1.03 billion for Title I/III and $750 million for Title II). However, additional foreign food donations are authorized for humanitarian purposes under Section 416 of the Agricultural Act, as amended. And a "Food for Progress" program has been proposed which would allow a maximum of 500,000 tons of commodities to be shipped in response to domestic agricultural policy reforms.

Additional food needs to support consumption, stocks adjustment, and maximum food imports, 1985/86

Region	Consumption		Consumption plus stocks		Maximum 1/
	Status quo	Nutrition-based	Status quo	Nutrition-based	
	Thousand tons (cereal equivalent) 2/				
Total Africa	4,450	8,832	4,981	9,285	8,289
North Africa	1,885	0	1,967	0	1,967
Sub-Saharan Africa	2,565	8,832	3,014	9,285	6,322
West Africa	869	2,514	957	2,605	1,892
Central Africa	178	265	189	277	282
East Africa	980	4,374	1,324	4,718	3,071
Southern Africa	538	1,679	544	1,685	1.077
Middle East	714	551	775	607	788
Total Asia	3,506	8,147	3,649	8,677	5,245
South Asia	2,513	6,616	2,450	6,940	3,513
Southeast Asia	993	1,531	1,199	1,737	1,732
Total Latin America	347	1,070	475	1,199	996
Caribbean	172	415	205	447	333
Central America	175	305	196	360	341
South America	0	350	74	392	322
Total All Regions	9,017	18,600	9,880	19,768	15,318

1/ Imports consistent with maximum recent levels of consumption and food stocks.
2/ Major cereals, and the cereal equivalent of shortfalls in roots and tubers.

Food Aid Availabilities and Outlook

Cereal food aid from all donors reached the highest level since 1971/72 in the 1984/85 July-June year. Close to 12 million tons were shipped, of which the United States supplied 60 percent, followed by the EC (with 20 percent), Canada (less than 10 percent), and Australia (less than 5 percent). Almost 90 percent of such aid, or more than 10.5 million tons, was distributed to low-income, food-deficit countries, more than half of which were in Africa.

FAO estimates that cereal aid shipments will fall almost 10 percent during July 1985-June 1986 to less than 11 million tons. Most of this decline is due to a drop in estimated EC cereal aid to levels similar to those before the African famine.

UNITED STATES FOOD AID PROGRAMS

Several changes in U.S. food aid programs have been enacted or are under consideration by Congress. Under the International Security and Development Cooperation Act of 1985, changes have been made in the PL 480 and Section 416 programs. The minimum volume of food donations under PL 480 Title II was increased from 1.7 million tons per year to 1.8 million in fiscal 1986 and 1.9 million in fiscal 1987. Since at least fiscal year 1981, the minimum programmed volume of Title II has been at least 1.8 million tons, and has been 2 million tons or greater since fiscal 1983. The minimum amount of Title II commodities distributed through private voluntary orgranizations and the World Food Program (WFP) was increased from 1.2 million tons to 1.3 million in fiscal 1986 and 1.425 million in fiscal 1987.

In addition to PL 480, foreign donations are authorized for humanitarian purposes under Section 416 of the Agricultural Act of 1949, as amended. In 1982, overseas donations of CCC-owned dairy stocks were authorized. In 1984, wheat donations were authorized, and in 1985, rice was also added. Both House and Senate farm bills include provisions to expand Section 416, in both type and volume of commodities.

To better use U.S. food surpluses to foster agricultural development overseas, the "Food for Progress" program has been proposed. Under this, the United States would grant commodities to developing countries on a multiyear basis as a reward for adopting market-oriented agricultural policies. The program would last through fiscal 1989 and involve a maximum of 500,000 tons of commodities per year.

The program level for the fiscal 1986 PL 480 program has yet to be finalized. The Administration's proposed program level is $1.8 billion (1.03 billion for Title I/III and $750 million for Title II), compared with $2.2 billion in fiscal 1985.

FOOD AID PROGRAMS OF OTHER DONORS

Food aid programs of other donors are generally expected to be less than in the past year. While the Australian program will increase by about $6.3 million, it will hardly offset the $54-million decline in Canadian food aid. The Australian food aid budget for the July 1985/June 1986 fiscal year is estimated to increase 8 percent over 1984/85 to A$121.2 million (about $85 million). Almost all of this is due to increased cash and commodity donations through the WFP. Canada reports a drop in its food aid budget of 20 percent to C$310.5 million (about $230 million at current exhange rates) in the April 1985/March 1986 budget. Bilateral donations received most of the cut, falling 25 percent from 1984/85 levels while the multilateral budget was cut 10 percent. The budget for wheat and skim milk powder donations is 10-15 percent below last year's levels while that for maize is slightly up.

As of June 30 1985, the EC had shipped or actually delivered about 290,000 tons of the allocated 1.16 million tons of cereals in the 1984/85 cereal aid program. A reserve of about 585,000 tons had yet to be allocated. Almost none of the approximately 110,000 tons of skim milk powder and 30,000 tons of butteroil under the program had been delivered.

ADDITIONAL FOOD NEEDS OF LOW-INCOME COUNTRIES

Financial Situation in the Low-Income Countries

The fundamental outlook for financial conditions in the low-income developing countries covered in this report is largely unchanged from the full report published in July. Export growth is expected to increase in 1985 and 1986, boosting foreign-exchange earnings. Imports are also expected to rise, due to increased foreign exchange.

Several key components of the outlook are slightly changed from the July report, with mixed implications for the financial conditions of the countries in this report. Prices contuinue to decline for a broad base of primary commodities. For the index published by the International Monetary Fund (IMF), the average of commodity prices for the first half of 1985 declined 15 percent relative the the average for the first half of 1984. This movement in prices implies that foreign exchange earnings will probably grow more slowly than projected in the July report, assuming that increases in export volumes are insufficient to offset these and potential further price declines. Such an increase in export volumes may be problematic over the next 6 quarters; economic growth in the industrialized countries will likely be slightly slower than projected in the July report--3 percent in 1985 and in 1986. Current prospects suggest that growth in the industrialized economies will average 2.8 percent in 1985 and slow to 2.4 percent next year. These growth rates imply moderate growth in import demand in the developed world, but somewhat slower than if overall economic growth were 3 percent.

Two favorable conditions are that international interest rates are lower than earlier in the year and the dollar is substantially below its peak value of early 1985. Short-term interest rates averaged more than a full point below year-earlier levels during the first three quarters of 1985, and prospects are very good that interest rates will average lower though 1986 than earlier projected. A 1-percentage point decline in interest rates would translate into about a $430-million savings in debt-service payments for the low-income countries over 1985 and 1986.

By early October, the dollar had declined 17 percent from its peak values in February 1985. This decline, if sustained, would improve the trade balances of the low-income countries in the short-term through higher export earnings and lower import costs. By mid to late 1986, volumes traded would probably begin to adjust to the relative price changes brought about by the current and sustained declines in the dollar, and trade balances will stabilize or deteriorate if continual adjustments are not made. The implications for debt-service payments are positive for debts denominated in dollars; a given amount of domestic currency would purchase an increased amount of dollars, thereby making the repayment of dollar-denominated debts easier.

Commercial Capacity to Import Food

Several alternative methods are available to convert general financial indicators into precise measures of the low-income countries' capacity to import food. The calculation used in this study is based on estimates of each country's foreign exchange earnings, import bills, foreign exchange reserves and debt service, and historical commercial food import patterns and food import unit values. Estimates of a country's foreign exchange earnings were made on the basis of export trade forecasts and, in selected cases, other sources of earnings such as worker remittances and tourism. The foreign exchange earnings estimate was added to estimates of a country's foreign exchange reserves to arrive at total foreign exchange supplies. The total was then adjusted using historical and estimated import bills to maintain the country's historical reserves-to-imports ratio.

The adjusted foreign exchange availability estimate was reduced further by the country's debt-service obligations to arrive at a net foreign exchange availability. The proportion of this net foreign exchange availability allocated to commercial food imports in the base period was held constant and used to caluculate the foreign exchange available in the forecast period for commercial food imports. The volume of imports that could be purchased is estimated using this final estimate of net foreign exchange availability and expected food import unit values.

Measures of Additional Food Needs

Conceptual Framework

The financial indicators noted above and the food data described below are used to generate two alternative measures of food need in addition to estimated commercial import capacity. Countries must choose between making extraordinary commercial purchases and seeking food aid to fill this gap. However, extraordinarily large commercial imports, particularly in successive years, would be at the cost of other imports, including imports of development goods. In addition, a measure is computed of the maximum quantities of commodities which countries could feasibly import. Each measure highlights a different aspect of the food problem in the low-income countries and a different notion of the role aid might play in easing the problem. (For a more detailed discussion, see section entitled "Methodological Notes" in the July, 1985 World Food Needs and Availabilities pp. 236-252.)

The first measure, termed "status quo," estimates the additional food needed to maintain per capita intake of food staples at levels reported over the last 4 years. This measure is based on current consumption levels. No provision is made either for improving substandard diets, for reducing allocations to countries where diets are relatively good, or

for correcting problems related to the uneven distribution of food across or within countries. Because status quo estimates support a level of per capita availability that has been achieved in the past, in most cases they can be considered to be consistent with the capacity of countries to absorb food imports.

The second measure, termed "nutrition-based," estimates the additional food required to raise per capita caloric intake to the levels associated with FAO's recommended minimum diet. This measure is based on the notion that food aid might be utilized in a way consistent with nutritional need rather than to maintain a recent, possibly substandard, status quo. In this sense, the nutrition-based measure might be viewed as a maximum level of additional food need, but not necessarily consistent with a country's ability to absorb food imports.

The measure of food import feasibility called "maximum absorbable imports" provides one basis for assessing what maximum quantity of additional food might be imported toward meeting large nutrition-based food needs, or possibly for building stocks in a period of ample world food supplies.

While the status quo and nutrition-based methods differ in the estimation of requirements, they have a common structure. In each, an estimate of every country's domestic supplies of food staples is subtracted from an estimate of staple food requirements to arrive at a quantity estimate of import requirements. Import requirements are then totaled for food groups, based on assumptions regarding their substitutability. An estimate of a country's capacity to commercially import food in each category is then substracted from the import requirement to arrive at an estimate of additional food needs. Estimated import unit values for each food group are used to generate import requirements, and additional food needs estimates in both quantity and value terms.

The assessment of maximum absorbable aid is an adjustment of nutrition-based food needs to take account of infrastructural limitations. The calculation of this adjustment is based on historical maximum levels of consumption and stocks.

Several factors affecting additional food needs in a country are not addressed in these estimates. First, food distribution problems--both geographical and across income or population groups--are overlooked by the use of national level food availability and country average food requirement measures. These can mask acute shortages in specific places within a country as well as uneven distribution of food across population groups. However, measuring the unevenness of food distribution is extremely difficult, because data are not available. Acute problems of this nature are treated qualitatively in the country narratives.

Second, additional food needs are estimated without refererence to a country's food and agriculture policies and current performance. Although these issues figure importantly in choosing between exceptional commercial food purchases and concessional food imports, a comprehensive consideration of them is beyond the scope of this report.

Introduction to Country Narrative Tables

The following section reports on the food and financial situation and outlook for 28 countries in Africa, the Middle East, Asia, and Latin America. The materials summarize events during the 1984/85 local marketing year (generally July–June) and project food and financial conditions for 1985/86 and 1986/87.

Data shown in the tables must be interpreted with caution. Forecasts of food production, population, and financial conditions for 1985/86 and 1986/87 represent ERS's forecasts of what is likely to happen during those years. But, 1985/86 and 1986/87 estimates of all other items--stocks, use, import requirements, and aid needs--are not forecasts of what is likely to happen; they are targets derived using the status quo and nutrition assumptions summarized in the previous section, and explained in detail in the "Methodological Notes" section of the July annual report. Aid need calculations are also subject to a number of adjustments detailed in the methodology section of the annual report.

In each of the country tables, any quantity less than 500 tons and any value less than $500,000 is shown as zero.

Tables Entitled "[Country] basic food data"

These tables provide food staple supply and utilization data for 1980/81–1984/85 and for forecast years (1985/86 and 1986/87). An explanation of each column heading follows:

1. Actual or forecast production--actual production for the individual staples for the 1981/82–1984/85 base period and forecast production for 1985/86 and 1986/87.

2. Net imports--actual net imports during 1981/82–1984/85. Net import figures for forecast years are not supplied. Instead, estimated import requirements based on status quo and nutrition-based approaches are provided in the next set of tables.

3. Nonfeed use--actual human consumption during the 1981/82– 1984/85 base period.

4. Feed use--actual feed use during 1981/82–1984/85 and targeted feed use for 1985/86 and 1986/87. Targeted feed use is calculated to maintain per capita feed use at base-period levels. The same level of feed use is employed in the status quo and nutrition-based estimates of aid needs.

5. Beginning stocks--actual stocks for 1981/82–1984/85. Initial calculations of status quo and nutrition-based import and aid needs are done by maintaining the ending stocks for 1984/85 (beginning stocks 1985/86) constant throughout the forecasting period. Import requirements for building food security stocks are calculated subsequently for the countries for which stock data are available.

6. Per capita total use--actual per capita human consumption and livestock feed use for 1981/82-1984/85.

7. Commodity coverage--the food staples included for each country.

8. Share of diet--each staple's share of total daily caloric intake, and the share of total daily caloric intake covered by the food staples analyzed. Data are drawn from the 1979-81 FAO Food Balance Sheets with adjustments made in some cases for differences in FAO or ERS estimates of feed use or more recent significant changes in a staple's share of the diet.

Tables Entitled "Import requirements for [Country]"

These tables deal only with 1985/86 and 1986/87 estimates. An explanation of each column heading follows:

1. Forecast domestic production--data are drawn from the "basic food data" tables.

2. Total use, status quo--total amount of a staple needed to maintain per capita human consumption at the 1981/82-1984/85 level and feed use at the targeted level.

3. Total use, nutrition-based--the amount of a staple needed to support FAO recommended minimum daily per capita caloric intake levels and targeted feed use.

4. Import requirements, quantity, status quo--the imports of a staple required to maintain base-period per capita consumption, and also to achieve the targeted levels of feed use with no change in stocks, as shown in the basic food data table. These estimates are calculated for each staple by subtracting forecast domestic production from status quo-based total use.

   Subtotals for each commodity group are calculated by summing the import requirements for individual commodities. Calculated surpluses (negative import requirements) for individual commodities within groups are subtracted from deficits in other commodities because foods are assumed to be substitutable within groups. Noncereals such as roots and tubers are converted to caloric wheat equivalents before being summed. Negative subtotals are shown as zeros because these calculated surpluses are assumed not to be substitutable elsewhere in the diet.

5. Import requirements, quantity, nutrition-based--the imports of a staple required to support recommended minimum per capita caloric intake, and targeted feed use, as no change in stocks is shown in the basic food

data tables. These estimates are calculated by subtracting forecast domestic production from nutrition-based total use. Totals for each commodity group by year are computed as described in (4) above.

6. Import requirements, maximum---the largest quantity that could be managed if countries wished to take the greatest advantage of low grain prices to improve stocks or to improve on the nutritional status of the population.

Tables Entitled "Additional food needs for [Country], with stock adjustment and as constrained by maximum absorbable imports"

These tables provide calculations of cereal import requirements and food needs in excess of normal commercial imports resulting from consumption requirements and from estimates of cereal stock adjustments required for food security purposes. The estimated stock increment (quantity and value) is added to import requirements and aid needs to support consumption to arrive at total import requirements and additional food needs. For a discussion of how stock increment estimates are calculated, see "Methodological Notes" in the annual report.

1. Commercial import capacity---an estimate of the amount of food within each group that a country can afford to import commercially without reducing below historical levels the share of its available foreign exchange used for nonfood imports. Countries are required in forecast years to spend the same proportion of available foreign exchange on commercial food imports as in the base period. The measure is sensitive to historical and projected levels of foreign exchange holdings, total merchandise imports and exports, and debt service. The measure is provided in both quantity and value, using the same country-specific estimates of unit import costs as in the import requirements estimate.

2. Additional food needs, quantity---the estimated quantity of additional food needed in each commodity group to support either the status quo or nutrition-based use level and targeted stock and feed use levels. Negative needs are shown as zero.

3. Additional food needs, value---the estimated value of the additional food needed in each commodity group to maintain either status quo consumption or nutrition-based consumption and targeted stock and feed use levels.

Tables Entitled "Financial indicators for [Country], actual and projected"

These tables give historical data and forecasts for four key financial indicators: yearend international reserves, merchandise exports, merchandise imports, and debt-service obligations. All data are on a calendar year basis and are compiled from a variety of sources, including the World Bank, the International Monetary Fund, Chase Econometrics, country sources, and ERS estimates.

North Africa

EGYPT

Egypt's reliance upon food aid has increased because of its worsening financial situation and debt problems. Foreign exchange earnings in 1985 will be down to about $11.2 billion, compared with $12.2 billion in 1984. A ruling on January 5, 1985, regulating the inflow of remittances appears to have caused many Egyptians working in other countries to avoid banks in Egypt. As a result, remittances which were estimated at $4 billion in 1984, may be down by $1 billion in 1985. Also, foreign exchange earnings from the Suez Canal will be less than the $1.1 billion of 1984. A decline in Arab petroleum exports to Europe has reduced traffic through the Canal. Egypt's petroleum exports are expected to decline slightly because of lower prices. Greater exports through countertrade to developing countries have helped offset the sharp reduction in cash sales of petroleum to the EC and the United States.

Egypt's total foreign debt now exceeds $32 billion including the military debt, but excluding $2.5 billion owed to the Soviet Union. Total U.S. financial assistance of $2.3 billion includes a large segment of grants. Egypt will receive $213 million for Title I, P.L. 480 purchases of 1.4 million tons of wheat and flour in fiscal 1986. The additional food needs requirement for 1985/86 is now estimated at 1.9 million tons, compared with 1.6 million estimated in July because of the reduced availability of foreign exchange. Commercial import capacity has declined, but total grain imports in 1985 may remain near the 8.8 million tons of 1984. Grain production increased 7 percent in 1985 to 8.5 million tons because of a rebound of wheat to about 2 million tons, and a record corn harvest of 4.1 million tons. Greater use of improved varieties and fertilizer resulted in higher yields.

Egypt basic food data

Commodity/year	Actual or forecast production	Begin-ning stocks	Net Imports	Nonfeed use	Feed use	Per capita total use	1979-81 Commodity coverage	1979-81 Share of diet
	1,000 tons					Kilos		Percent
Major cereals								
1980/81	7,373	2,570	6,267	11,730	2,060	327	Wheat	33.1
1981/82	7,424	2,420	7,294	12,618	2,418	347	Rice	11.5
1982/83	7,714	2,102	7,017	12,305	2,611	335	Corn	18.3
1983/84	7,883	1,917	8,242	13,134	2,782	347	Sorghum	1.9
1984/85	7,990	2,126	8,835	13,698	3,122	357	Barley	0.0
1985/86	8,517	2,131	—	—	—	—	Total	64.9
1986/87	8,755	2,131	—	—	—	—		

Import requirements for Egypt

Commodity/year	Production	Total use		Import requirements		
		Status quo	Nutrition-based	Status quo	Nutrition-based	Maximum
	1,000 tons					
Cereal equivalent						
1985/86	8,517	16,747	13,009	8,230	4,492	9,828
1986/87	8,755	17,201	13,003	8,446	4,248	10,058

Financial indicators for Egypt, actual and projected

Year	Exports and other credits	Imports and other debits	Debt service	International reserves	Foreign exchange available	
					Total	Share to major food imports
	Million dollars					Percent
1980	9,307	9,745	1,411	1,046	7,896	15
1981	10,449	12,054	1,904	716	8,545	20
1982	10,091	12,385	1,878	698	8,213	19
1983	10,732	12,516	2,466	771	8,266	21
1984	12,237	14,352	2,352	736	8,341	NA
1985	11,157	13,913	2,268	736	8,833	20
1986	10,800	14,400	1,821	736	8,895	20

Additional food needs to support consumption for Egypt, with stock adjustment

Commodity/year	Commercial import capacity		Status quo		Nutrition-based	
	Quantity	Value	Quantity	Value	Quantity	Value
	1,000 tons	Million $	1,000 tons	Million $	1,000 tons	Million $
Cereal equivalent						
Consumption						
1985/86	6,345	1,305	1,885	388	0	0
1986/87	6,610	1,314	1,836	365	0	0
Stock adjustment						
1985/86	NA	NA	64	13	64	13
1986/87	NA	NA	110	22	110	22
Total						
1985/86	NA	NA	1,949	401	0	0
1986/87	NA	NA	1,946	387	0	0

TUNISIA

Almost perfectly timed rainfall through the 1984/85 crop year is credited for a record harvest. This has substantially reduced Tunisia's grain import requirements and eliminated additional food needs. The total grain harvest estimate is 2.08 million tons, more than double last year. Wheat production is estimated at 1.38 million tons; 1.067 million tons durum and the remainder bread wheat. Barley production is placed at 700,000 tons, more than double last year's crop.

While good weather is the primary cause of this year's harvest, credit must also be given to the Tunisian government's efforts to raise producer prices. Producer prices for durum have averaged 92 percent of the world price since the 1981/82 crop year, and bread wheat prices have averaged 104 percent of the world level. The government is raising the relative price of bread wheat to durum in an effort to induce farmers to produce more bread wheat. The decision appears motivated more by food security concerns than by economic considerations. Tunisia, by all accounts, has a comparative advantage in durum relative to bread wheat; moreover, durum wheat prices always carry a premium over bread wheat prices. However, while Tunisia produces about 60 percent of its durum needs, it covers only about one-quarter of its bread wheat needs.

Tunisia is not likely to import durum until spring 1986. Most bread wheat needs are likely to be covered by France under credit remaining in a COFACE account; it is believed that a new COFACE line of credit will be made available for 1986.

Reports from Tunis indicate that barley will be substituted for corn as much as possible in livestock and poultry feeding.

Tunisia basic food data

Commodity/year	Actual or forecast production	Begin-ning stocks	Net imports	Nonfeed use	Feed use	Per capita total use	1979-81 Commodity coverage	1979-81 Share of diet
	1,000 tons					Kilos		Percent
Major cereals								
1980/81	1,166	211	959	1,588	507	323	Wheat	53.0
1981/82	1,234	241	1,142	1,729	668	360	Barley	2.3
1982/83	1,256	220	898	1,741	483	325	Corn	.0
1983/84	922	150	1,269	1,685	521	315	Total	55.4
1984/85	1,024	135	1,080	1,578	591	302		
1985/86	2,081	70	--	--	--	--		
1986/87	1,301	70	--	--	--	--		

Import requirements for Tunisia

Commodity/year	Production	Total use		Import requirements		
		Status quo	Nutrition-based	Status quo	Nutrition-based	Maximum
	1,000 tons					
Cereal equivalent						
1985/86	2,081	2,447	2,200	366	119	673
1986/87	1,301	2,449	2,071	1,148	770	1,517

Financial indicators for Tunisia, actual and projected

Year	Exports and other credits	Imports and other debits	Debt service	International reserves	Foreign exchange available	
					Total	Share to major food imports
	Million dollars					Percent
1980	3,296	3,823	431	590	2,865	9
1981	3,616	4,108	518	536	3,099	8
1982	3,208	3,929	486	607	2,723	7
1983	3,097	3,657	598	567	2,499	10
1984	3,343	3,724	682	409	2,773	NA
1985	3,563	3,956	618	409	2,810	8
1986	3,799	3,992	597	409	3,063	8

Additional food needs to support consumption for Tunisia, with stock adjustment

Commodity/year	Commercial import capacity		Status quo		Nutrition-based	
	Quantity	Value	Quantity	Value	Quantity	Value
	1,000 tons	Million $	1,000 tons	Million $	1,000 tons	Million $
Cereal equivalent						
Consumption						
1985/86	1,138	174	0	0	0	0
1986/87	1,283	189	0	0	0	0
Stock adjustment						
1985/86	NA	NA	58	9	58	9
1986/87	NA	NA	32	5	32	5
Total						
1985/86	NA	NA	0	0	0	0
1986/87	NA	NA	0	0	0	0

West Africa

BURKINA

Grain production in 1985/86 is expected to increase about 15 percent over 1984/85. The new estimate of 1.27 million tons is about 70,000 tons greater then the July figure and is mainly due to adequate rainfall over most of the country. As of September 10, 1985, precipitation at all reporting stations except Ouahigouya was at least 75 percent of the mean and significantly above last year. Except for the area around Ouahigouya in the north, crops are in good condition and harvesting of corn and peanuts began in September. Unusually heavy rains in some areas have caused flooding and some minor crop damage. Losses to pests and disease will be higher this year because of higher moisture levels; however, these will only have a small impact on total production.

Burkina basic food data

Commodity/year	Actual or forecast production	Begin-ning stocks	Net imports	Nonfeed use	Feed use	Per capita total use	1979-81 Commodity coverage	1979-81 Share of diet
	1,000 tons					Kilos		Percent
Major cereals								
1980/81	1,006	0	65	1,067	4	174	Wheat	1.6
1981/82	1,275	0	106	1,378	3	220	Rice	3.6
1982/83	1,189	0	95	1,282	2	200	Millet and	
1983/84	1,135	0	179	1,312	2	200	sorghum	56.1
1984/85	1,119	0	241	1,338	2	199	Corn	8.1
1985/86	1,270	20	--	--	--	--	Total	69.5
1986/87	1,282	20	--	--	--	--		

Import requirements for Burkina

Commodity/year	Production	Total use		Import requirements		
		Status quo	Nutrition-based	Status quo	Nutrition-based	Maximum
Major cereals	1,000 tons					
1985/86	1,270	1,414	1,472	144	202	251
1986/87	1,282	1,449	1,505	167	223	277

Financial indicators for Burkina, actual and projected

Year	Exports and other credits	Imports and other debits	Debt service due	International reserves	Foreign exchange available: Total	Foreign exchange available: Share to major food imports
	Million dollars					Percent
1980	161	368	17	68	144	27
1981	122	302	15	71	108	22
1982	119	275	17	62	102	19
1983	123	279	14	85	109	22
1984	134	274	22	103	98	NA
1985	141	288	17	103	145	21
1986	148	302	18	103	147	21

Additional food needs to support consumption for Burkina

Commodity/year	Commercial import capacity: Quantity	Commercial import capacity: Value	Status quo: Quantity	Status quo: Value	Nutrition-based: Quantity	Nutrition-based: Value
	1,000 tons	Million $	1,000 tons	Million $	1,000 tons	Million $
Cereal equivalent						
Consumption						
1985/86	69	12	75	13	133	24
1986/87	73	13	95	16	150	26
Stock adjustment						
1985/86	NA	NA	1	0	1	0
1986/87	NA	NA	1	0	1	0
Total						
1985/86	NA	NA	76	14	134	24
1986/87	NA	NA	95	17	151	26

CAPE VERDE

Improved weather conditions in Cape Verde have had very little effect on import requirements, since only 6 percent of total grain use comes from domestic production. Minor changes from the July report reflect revisions in 1984/85 import data. The growing season in Cape Verde is somewhat later than the rest of the Sahel, so rainfall in October will be critical for crop development.

Cape Verde basic food data

Commodity/year	Actual or forecast production	Begin-ning stocks	Net imports	Nonfeed use	Feed use	Per capita total use	1979-81 Commodity coverage	1979-81 Share of diet
	1,000 tons					Kilos		Percent
Major cereals								
1980/81	6	0	59	65	0	225	Wheat	9.0
1981/82	3	0	55	58	0	198	Rice	9.0
1982/83	4	0	45	49	0	164	Corn	41.0
1983/84	3	0	91	94	0	310	Pulses	4.7
1984/85	3	0	63	66	0	214	Total	63.8
1985/86	4	0	—	—	—	—		
1986/87	5	0	—	—	—	—		
Pulses								
1980/81	2	0	0	2	0	7		
1981/82	3	0	0	3	0	10		
1982/83	4	0	0	4	0	13		
1983/84	5	0	0	5	0	17		
1984/85	5	0	2	7	0	23		
1985/86	4	0	—	—	—	—		
1986/87	4	0	—	—	—	—		

Import requirements for Cape Verde

Commodity/year	Production	Total use: Status quo	Total use: Nutrition-based	Import requirements: Status quo	Import requirements: Nutrition-based	Import requirements: Maximum
	1,000 tons					
Major cereals						
1985/86	4	69	50	65	46	93
1986/87	5	71	51	66	46	94
Pulses						
1985/86	4	5	4	1	0	3
1986/87	4	5	4	1	0	3

Financial indicators for Cape Verde, actual and projected

Year	Exports and other credits	Imports and other debits	Debt service due	International reserves	Foreign exchange available: Total	Foreign exchange available: Share to major food imports
	Million dollars					Percent
1980	51	56	0	25	51	16
1981	41	65	0	26	40	14
1982	49	78	2	28	47	9
1983	53	68	3	26	50	5
1984	54	60	5	25	49	NA
1985	55	60	1	25	56	9
1986	57	60	1	25	57	9

Additional food needs to support consumption for Cape Verde

Commodity/year	Commercial import capacity: Quantity	Commercial import capacity: Value	Status quo: Quantity	Status quo: Value	Nutrition-based: Quantity	Nutrition-based: Value
	1,000 tons	Million $	1,000 tons	Million $	1,000 tons	Million $
Cereal equivalent Consumption						
1985/86	12	2	53	9	33	6
1986/87	13	2	52	9	32	5
Pulses						
1985/86	1	0	0	0	0	0
1986/87	1	0	0	0	0	0
Total						
1985/86	NA	NA	NA	9	NA	6
1986/87	NA	NA	NA	6	NA	5

1/ Surplus pulse import capacity offsets some cereal needs.

CHAD

Following the severe drought in 1984/85, Chad has received excellent rainfall for the 1985/86 crops. Full recovery in food production is not expected this year, however, because of past disruptions including drought and civil war. In 1984, cereal production dropped to 300,000 tons, 40 percent below the 1981–83 average. For this analysis, a preliminary estimate of 490,000 tons was used for 1985/86 cereal production.

Weak export performance explains the low commercial import capacity of 25,000 tons of cereals for 1985/86. Additional food needs for 1985/86 are now assessed at 54,000 tons under status quo assumptions and 391,000 tons under the nutrition-based method. Food aid stocks are estimated at 40,000 tons, with an additional 50,000 tons of food aid pledged.

Chad basic food data

Commodity/year	Actual or forecast production	Begin-ning stocks	Net imports	Nonfeed use	Feed use	Per capita total use	1979-81 Commodity coverage	1979-81 Share of diet
	1,000 tons					Kilos		Percent
Major cereals								
1980/81	649	0	30	679	0	154	Wheat	1.4
1981/82	548	0	59	607	0	134	Rice	3.8
1982/83	466	0	59	525	0	110	Corn	1.2
1983/84	490	0	113	603	0	121	Millet	47.7
1984/85	300	0	161	416	0	81	Cassava	7.2
1985/86	490	45	--	--	--	--	Total	61.3
1986/87	500	45	--	--	--	--		
Roots								
1980/81	185	0	0	185	0	42		
1981/82	191	0	0	191	0	42		
1982/83	197	0	0	197	0	41		
1983/84	200	0	0	200	0	40		
1984/85	170	0	0	170	0	33		
1985/86	200	0	--	--	--	--		
1986/87	200	0	--	--	--	--		

Import requirements for Chad

Commodity/year	Production	Total use		Import requirements		
		Status quo	Nutrition-based	Status quo	Nutrition-based	Maximum
	1,000 tons					
Major cereals						
1985/86	490	569	865	79	375	194
1986/87	500	580	882	80	382	197
Roots						
1985/86	200	200	300	(0)	100	15
1986/87	200	204	305	4	105	19
Cereal Equivalent						
1985/86	570	649	986	79	415	200
1986/87	580	662	1,004	81	424	205

Financial indicators for Chad, actual and projected

Year	Exports and other credits	Imports and other debits	Debt service	International reserves	Foreign exchange available	
					Total	Share to major food imports
	Million dollars					Percent
1980	71	87	2	5	69	13
1981	88	108	3	7	84	8
1982	62	105	0	12	62	6
1983	107	183	1	28	106	2
1984	117	150	3	38	107	NA
1985	110	119	2	38	126	6
1986	116	122	2	38	132	6

Additional food needs to support consumption for Chad, and as constrained by maximum absorbable imports

Commodity/year	Commercial import capacity		Status quo		Nutrition-based	
	Quantity	Value	Quantity	Value	Quantity	Value
	1,000 tons	Million $	1,000 tons	Million $	1,000 tons	Million $
Cereal equivalent						
Consumption						
1985/86	25	5	54	12	391	86
1986/87	27	6	55	12	397	85
Stock adjustment						
1985/86	NA	NA	15	3	15	3
1986/87	NA	NA	1	0	1	0
Total						
1985/86	NA	NA	69	15	406	89
1986/87	NA	NA	56	12	399	85
Maximum absorbable						
Cereal equivalent						
1985/86	NA	NA	69	15	175	39
1986/87	NA	NA	56	12	178	38

GAMBIA

Revisions in historical production and financial data caused Gambia's additional food need estimate to increase to 38,000 tons, about 50 percent over the previous estimate. In spite of a late start, rainfall through mid-September has been above the level of 1983 and 1984. The outlook is for a normal harvest.

Gambia basic food data

Commodity/year	Actual or forecast production	Begin-ning stocks	Net imports	Nonfeed use	Feed use	Per capita total use	1979-81 Commodity coverage	1979-81 Share of diet
	1,000 tons					Kilos		Percent
Major cereals								
1980/81	62	0	44	106	0	168	Rice	34.9
1981/82	80	0	41	121	0	185	Millet	7.5
1982/83	90	0	50	140	0	207	Wheat	5.6
1983/84	60	0	77	137	0	196	Corn	4.7
1984/85	77	0	41	118	0	163	Sorghum	7.8
1985/86	77	0	--	--	--	--	Total	60.5
1986/87	83	0	--	--	--	--		

Import requirements for Gambia

Commodity/year	Production	Total use: Status quo	Total use: Nutrition-based	Import requirements: Status quo	Import requirements: Nutrition-based	Import requirements: Maximum
	1,000 tons					
Major cereals						
1985/86	77	141	133	64	56	79
1986/87	83	146	138	63	55	78

Financial indicators for Gambia, actual and projected

Year	Exports and other credits	Imports and other debits	Debt service	International reserves	Foreign exchange available: Total	Foreign exchange available: Share to major food imports
	Million dollars					Percent
1980	117	145	1	6	116	10
1981	78	114	3	4	76	8
1982	73	93	11	8	62	16
1983	81	85	6	3	75	12
1984	74	83	7	2	61	NA
1985	63	79	4	2	58	12
1986	61	120	4	2	53	12

Additional food needs to support consumption for Gambia

Commodity/year	Commercial import capacity: Quantity	Commercial import capacity: Value	Status quo: Quantity	Status quo: Value	Nutrition-based: Quantity	Nutrition-based: Value
	1,000 tons	Million $	1,000 tons	Million $	1,000 tons	Million $
Cereal equivalent Consumption						
1985/86	26	5	38	7	30	6
1986/87	25	4	24	4	30	5

GUINEA-BISSAU

Late arrival of rains at the beginning of the current growing season is expected to reduce rice output. The lower production estimate has contributed to an increase in additional food needs of 26,000 tons. Thus, additional food will again be required in 1985/86, largely because of urban consumption needs. Much of Guinea-Bissau's 53,000 ton status quo cereal import requirement for 1985/86 has already been met through donor pledges and planned commercial imports.

Guinea-Bissau basic food data

Commodity/year	Actual or forecast production	Begin-ning stocks	Net imports	Nonfeed use	Feed use	Per capita total use	1979-81 Commodity coverage	1979-81 Share of diet
	1,000 tons					Kilos		Percent
Major cereals								
1980/81	63	0	41	94	0	120	Rice	39.5
1981/82	105	10	22	127	0	159	Corn	16.3
1982/83	108	10	22	132	0	163	Millet and	
1983/84	101	8	39	145	0	175	Sorghum	4.5
1984/85	109	3	34	146	0	173	Roots	6.4
1985/86	91	0	—	—	—	—	Total	66.7
1986/87	112	0	—	—	—	—		
Roots								
1980/81	40	0	0	40	0	51		
1981/82	40	0	0	40	0	50		
1982/83	40	0	0	40	0	49		
1983/84	35	0	0	35	0	42		
1984/85	40	0	0	40	0	48		
1985/86	40	0	—	—	—	—		
1986/87	40	0	—	—	—	—		

Import requirements for Guinea-Bissau

Commodity/year	Production	Total use		Import requirements		
		Status quo	Nutrition-based	Status quo	Nutrition-based	Maximum
	1,000 tons					
Major cereals						
1985/86	91	144	136	53	45	69
1986/87	112	146	141	34	29	51
Roots						
1985/86	40	41	48	1	8	3
1986/87	40	41	49	1	9	4
Cereal equivalent						
1985/86	106	159	155	53	49	68
1986/87	127	162	160	35	33	50

Financial indicators for Guinea-Bissau, actual and projected

Year	Exports and other credits	Imports and other debits	Debt service	International reserves	Foreign exchange available: Total	Foreign exchange available: Share to major food imports
	Million dollars					Percent
1980	11	55	3	12	8	52
1981	14	52	2	15	12	55
1982	12	69	4	8	8	24
1983	9	57	4	4	5	63
1984	17	59	3	4	15	NA
1985	21	65	6	4	10	47
1986	25	65	8	4	13	47

Additional food needs to support consumption for Guinea-Bissau, with stock adjustment

Commodity/year	Commercial import capacity: Quantity	Commercial import capacity: Value	Status quo: Quantity	Status quo: Value	Nutrition-based: Quantity	Nutrition-based: Value
	1,000 tons	Million $	1,000 tons	Million $	1,000 tons	Million $
Cereal equivalent						
Consumption						
1985/86	13	3	40	11	36	10
1986/87	17	4	18	5	16	4
Stock adjustment						
1985/86	NA	NA	4	1	4	1
1986/87	NA	NA	3	1	3	1
Total						
1985/86	NA	NA	44	12	40	11
1986/87	NA	NA	21	5	19	5

MALI

Mali's additional food needs in 1985/86 are now expected to be 350,000 tons above the July estimate. The increased estimate is due to revisions in historical data series. A revised production series reported lower grain output, especially in 1984/85. The 1985/86 production estimate was lowered to be consistent with these new data, although the current harvest is still expected to be 24 percent higher than last year. Updated financial indicators caused a small decrease in commercial import capacity.

Rainfall in Mali has been much better this year, probably the best since the 1981/82. However Mali is feeling the lingering effects of the drought. Seed shortages, displaced persons, and low river levels will keep production well below historical records. Insect and disease problems are also being reported in some areas. Mali probably had food aid carryover stocks at the end of 1984/85 which could be applied to 1985/86 needs.

Mali basic food data

Commodity/year	Actual or forecast production	Begin-ning stocks	Net imports	Nonfeed use	Feed use	Per capita total use	1979-81 Commodity coverage	1979-81 Share of diet
	1,000 tons					Kilos		Percent
Major cereals								
1980/81	836	0	99	935	0	135	Wheat	1.6
1981/82	1,047	0	157	1,204	0	170	Rice	11.1
1982/83	975	0	155	1,130	0	156	Corn	4.6
1983/84	831	0	291	1,122	0	152	Millet	53.0
1984/85	704	0	325	999	0	132	Total	70.4
1985/86	870	30	--	--	--	--		
1986/87	935	30	--	--	--	--		

Import requirements for Mali

Commodity/year	Production	Total use: Status quo	Total use: Nutrition-based	Import requirements: Status quo	Import requirements: Nutrition-based	Import requirements: Maximum
	1,000 tons					
Cereals						
1985/86	870	1,181	1,595	311	725	448
1986/87	935	1,208	1,639	273	704	413

Financial indicators for Mali, actual and projected

Year	Exports and other credits	Imports and other debits	Debt service	International reserves	Foreign exchange available: Total	Foreign exchange available: Share to major food imports
	Million dollars					Percent
1980	263	555	9	15	254	10
1981	200	470	9	17	191	17
1982	189	414	8	17	181	23
1983	206	437	13	16	194	25
1984	228	449	17	27	163	NA
1985	220	475	10	27	216	22
1986	245	450	11	27	241	22

Additional food needs to support consumption for Mali, and as constrained by maximum absorbable imports

Commodity/year	Commercial import capacity: Quantity	Commercial import capacity: Value	Status quo: Quantity	Status quo: Value	Nutrition-based: Quantity	Nutrition-based: Value
	1,000 tons	Million $	1,000 tons	Million $	1,000 tons	Million $
Cereal equivalent						
Consumption						
1985/86	132	43	179	58	593	193
1986/87	152	48	121	38	552	174
Stock adjustment	NA	NA				
1985/86	NA	NA	5	2	5	2
1986/87			1	0	1	0
Total						
1985/86	NA	NA	184	60	599	195
1986/87	NA	NA	121	38	552	174
Maximum absorbable						
Cereal equivalent						
1985/86	NA	NA	184	60	316	103
1986/87	NA	NA	121	38	261	82

MAURITANIA

Mauritania's grain import requirements declined slightly from the July report mainly because of reduced use estimates in the base period. Also, 1984/85 grain imports likely were lower than expected. Production estimates were reduced slightly, but domestic output supplies only about 10 percent of total use. Since the rainy season did not begin until mid-July, Mauritania needed needed adequate rainfall in October for a good harvest. Reports of pest problems will need to be followed closely. Mauritania has government-held food aid carryover stocks from 1984/85 that could be used to partially meet 1985/86 needs, as these stocks greatly exceed historical levels.

Mauritania basic food data

Commodity/year	Actual or forecast production	Begin-ning stocks	Net imports	Nonfeed use	Feed use	Per capita total use	1979-81 Commodity coverage	1979-81 Share of diet
	1,000 tons					Kilos		Percent
Major cereals								
1980/81	27	0	161	188	0	125	Wheat	16.0
1981/82	74	0	209	283	0	185	Rice	14.1
1982/83	42	0	229	271	0	174	Corn	1.2
1983/84	22	0	270	292	0	184	Millet	17.0
1984/85	20	0	249	229	0	141	Other grains	.0
1985/86	22	40	--	--	--	--	Total	48.3
1986/87	25	40	--	--	--	--		

Import requirements for Mauritania

Commodity/year	Production	Total use		Import requirements		
		Status quo	Nutrition-based	Status quo	Nutrition-based	Maximum
	1,000 tons					
Cereal equivalent						
1985/86	22	238	260	261	238	284
1986/87	25	288	266	263	241	287

Financial indicators for Mauritania, actual and projected

Year	Exports and other credits	Imports and other debits	Debt service	International reserves	Foreign exchange available: Total	Foreign exchange available: Share to major food imports
	Million dollars					Percent
1980	196	321	30	139	166	18
1981	269	386	54	162	215	16
1982	240	427	40	139	200	25
1983	315	378	37	105	279	16
1984	286	382	42	78	192	NA
1985	278	354	44	78	203	19
1986	278	348	44	78	205	19

Additional food needs to support consumption for Mauritania

Commodity/year	Commercial import capacity: Quantity	Commercial import capacity: Value	Status quo: Quantity	Status quo: Value	Nutrition-based: Quantity	Nutrition-based: Value
	1,000 tons	Million $	1,000 tons	Million $	1,000 tons	Million $
Cereal equivalent						
Consumption						
1985/86	148	26	113	20	90	16
1986/87	154	27	109	19	86	15
Stock adjustment						
1985/86	NA	NA	9	2	9	2
1986/87	NA	NA	1	0	1	0
Total						
1985/86	NA	NA	122	22	100	18
1986/87	NA	NA	110	19	87	15

NIGER

Although rainfall through mid-September was slightly below the long-term mean, crop and pasture conditions are good. Reports from the field indicate that good distribution of rainfall has resulted in above-average yields in most areas despite moisture stress in parts of Maradi, Zinder, Niamey, and Tahoua regions. Grain production is likely to be near normal in 1985/86. The total output estimate was lowered slightly from the previous estimate to 1.7 million tons. Updated financial indicators made only a small change in commercial import capacity. Government held carryover food aid stocks of 70,000 tons can be applied against the 1985/86 import requirements.

Niger basic food data

Commodity/year	Actual or forecast production	Begin-ning stocks	Net imports	Nonfeed use	Feed use	Per capita total use	1979-81 Commodity coverage	1979-81 Share of diet
	1,000 tons					Kilos		Percent
Major cereals								
1980/81	1,752	0	144	1,787	0	323	Wheat	1.8
1981/82	1,662	109	113	1,799	0	315	Rice	4.3
1982/83	1,681	85	63	1,774	0	301	Millet and	
1983/84	1,716	55	31	1,737	0	286	sorghum	52.3
1984/85	1,053	65	295	1,336	0	213	Total	58.4
1985/86	1,685	77	—	—	—	—		
1986/87	1,737	77	—	—	—	—		

Import requirements for Niger

Commodity/year	Production	Total use: Status quo	Total use: Nutrition-based	Import requirements: Status quo	Import requirements: Nutrition-based	Import requirements: Maximum
	1,000 tons					
Cereals						
1985/86	1,685	1,809	2,027	124	342	394
1986/87	1,737	1,869	2,093	132	356	409

Financial indicators for Niger, actual and projected

Year	Exports and other credits	Imports and other debits	Debt service	International reserves	Foreign exchange available: Total	Foreign exchange available: Share to major food imports
	Million dollars					Percent
1980	566	794	39	125	527	7
1981	455	683	63	105	392	18
1982	369	534	111	30	257	9
1983	371	424	73	53	298	6
1984	310	341	67	89	247	NA
1985	310	360	55	89	294	11
1986	325	350	57	89	308	11

Additional food needs to support consumption for Niger, with stock adjustment

Commodity/year	Commercial import capacity: Quantity	Commercial import capacity: Value	Status quo: Quantity	Status quo: Value	Nutrition-based: Quantity	Nutrition-based: Value
	1,000 tons	Million $	1,000 tons	Million $	1,000 tons	Million $
Cereal equivalent						
Consumption						
1985/86	94	25	30	8	248	66
1986/87	102	26	29	8	254	66
Stock adjustment						
1985/86	NA	NA	27	7	27	7
1986/87	NA	NA	3	1	3	1
Total						
1985/86	NA	NA	57	15	275	74
1986/87	NA	NA	33	9	257	67

SENEGAL

Rainfall this season has been close to normal in most of the country. Even in the north where pockets of dryness are reported, conditions are much better than in 1983 and 1984. Total grain output is expected to be up about 20 percent from 1984/85. The increase in additional food needs is due to changes in the financial picture. The value of Senegal's peanut product exports could drop by as much as 50 percent this year because of reduced sales to the oil mills and declining world prices for peanut oil. Peanut products account for about 25 percent of Senegal's total export earnings.

Senegal basic food data

Commodity/year	Actual or forecast production	Begin-ning stocks	Net imports	Nonfeed use	Feed use	Per capita total use	1979-81 Commodity coverage	1979-81 Share of diet
	1,000 tons					Kilos		Percent
Major cereals								
1980/81	645	125	488	1,183	0	205	Wheat	6.2
1981/82	884	75	485	1,394	0	234	Rice	26.4
1982/83	737	50	532	1,294	0	211	Corn	4.5
1983/84	486	25	691	1,177	0	186	Millet	26.0
1984/85	660	25	558	1,193	0	182	Total	63.2
1985/86	785	50	--	--	--	--		
1986/87	820	50	--	--	--	--		

Import requirements for Senegal

Commodity/year	Production	Total use: Status quo	Total use: Nutrition-based	Import requirements: Status quo	Import requirements: Nutrition-based	Import requirements: Maximum
	1,000 tons					
Cereal equivalent						
1985/86	785	1,373	1,409	588	624	873
1986/87	820	1,416	1,454	596	634	887

Financial indicators for Senegal, actual and projected

Year	Exports and other credits	Imports and other debits	Debt service	International reserves	Foreign exchange available: Total	Foreign exchange available: Share to major food imports
	Million dollars					Percent
1980	600	1,032	172	8	428	29
1981	665	1,117	87	9	578	24
1982	726	1,033	40	11	686	18
1983	711	1,013	48	12	663	20
1984	717	984	93	4	534	NA
1985	660	980	67	4	588	21
1986	710	980	74	4	631	21

Additional food needs to support consumption for Senegal, with stock adjustment

Commodity/year	Commercial import capacity: Quantity	Commercial import capacity: Value	Status quo: Quantity	Status quo: Value	Nutrition-based: Quantity	Nutrition-based: Value
	1,000 tons	Million $	1,000 tons	Million $	1,000 tons	Million $
Cereal equivalent						
Consumption						
1985/86	446	86	142	28	178	34
1986/87	495	93	101	19	139	26
Stock adjustment						
1985/86	NA	NA	8	1	8	1
1986/87	NA	NA	2	0	2	0
Total						
1985/86	NA	NA	150	29	186	36
1986/87	NA	NA	103	19	141	26

ETHIOPIA

Strong improvement in Ethiopia's food production is expected if growing conditions continue to be favorable through the November/December harvest period. Ethiopia's cereal production fell to 5 million tons in 1984, 15 percent below the 1981–83 average. Recovery to 5.9 million tons is foreseen. Above-normal production is expected in the Gojam and Gondar regions which usually produce surpluses. This has reduced additional food needs from the previous estimate, yet, significant food import requirements will continue. Poor food production is expected in Eritrea, Tigre, Wollo, Hararghe, northern Shoa and northern Sidomo. Seed shortages, losses of draft animals, displaced populations, pests, continuing civil unrest and deteriorating soil conditions are all factors limiting Ethiopia's recovery.

Ethiopia will require 663,000 tons of cereal imports during 1985/86 to maintain cereal consumption at 1981/82–1984/85 levels. To cover nutritional requirements, 2.6 million tons would be required. However, the estimate of maximum absorbable imports is only 1.5 million tons. During 1985, cereal imports reached an unprecedented 1.3 million tons. Due to transportation delays, approximately 200,000 tons of food aid will be in storage at the end of 1985. Food aid accounted for over 70 percent of imports in 1985.

Ethiopia's commercial import capacity is estimated at 118,000 tons in 1985/86. Commercial imports reached nearly 200,000 tons during 1984/85; however, these were primarily wheat imports from France and Australia under concessional financing agreements. Large private transfers partially offset large deficits in trade of goods and services during 1983/84 and 1984/85.

Status quo additional food needs for 1985/86 are estimated at 545,000 tons, while nutrition-based needs are 2.5 million tons. These estimates reflect an upward revision of population data based on Ethiopia's first national census, conducted during 1983 and 1984. Since 200,000 tons of cereals are being carried into 1986 from 1985 imports, additional food needs to meet consumption requirements could be reduced. Localized shortages requiring food assistance are likely to continue within Ethiopia, particularly in northern areas and in pastoral herding areas. Many peasant farmers will not produce sufficient food for their own subsistence this season. Further assistance will be required to promote recovery and prepare for the 1986/87 agricultural cycle.

Ethiopia basic food data

Commodity/year	Actual or forecast production	Begin-ning stocks	Net imports	Nonfeed use	Feed use	Per capita total use	1979-81 Commodity coverage	1979-81 Share of diet
	1,000 tons					Kilos		Percent
Major cereals								
1980/81	5,553	495	226	5,881	173	154	Wheat	9.1
1981/82	5,334	220	303	5,567	160	143	Corn	9.8
1982/83	6,436	130	300	6,515	181	162	Sorghum	15.2
1983/84	5,750	170	508	6,167	176	151	Millet	2.0
1984/85	4,990	85	1,265	6,010	112	145	Barley	16.1
1985/86	5,920	218	—	—	—	—	Teff	15.5
1986/87	6,450	218	—	—	—	—	Total	67.7

Import requirements for Ethiopia

Commodity/year	Production	Total use: Status quo	Total use: Nutrition-based	Import requirements: Status quo	Import requirements: Nutrition-based	Import requirements: Maximum
	1,000 tons					
Cereal equivalent						
1985/86	5,920	6,583	8,532	663	2,612	1,470
1986/87	6,450	6,761	8,789	311	2,339	1,133

Financial indicators for Ethiopia, actual and projected

Year	Exports and other credits	Imports and other debits	Debt service	International reserves	Foreign exchange available: Total	Foreign exchange available: Share to major food imports
	Million dollars					Percent
1980	627	860	34	178	593	8
1981	592	887	40	118	553	6
1982	593	983	67	179	526	5
1983	667	1,006	89	107	578	5
1984	735	1,164	84	65	637	NA
1985	768	1,558	71	65	582	5
1986	850	1,275	78	65	689	5

Additional food needs to support consumption for Ethiopia, with stock adjustment

Commodity/year	Commercial import capacity		Status quo		Nutrition-based	
	Quantity	Value	Quantity	Value	Quantity	Value
	1,000 tons	Million $	1,000 tons	Million $	1,000 tons	Million $
Cereal equivalent						
Consumption						
1985/86	118	18	545	85	2,494	388
1986/87	145	22	167	25	2,195	330
Stock adjustment						
1985/86	NA	NA	16	3	16	3
1986/87	NA	NA	6	1	6	1
Total						
1985/86	NA	NA	561	87	2,510	391
1986/87	NA	NA	173	26	2,201	331
Maximum absorbable aid needs:						
Cereal equivalent						
1985/86	NA	NA	561	87	1,352	211
1986/87	NA	NA	173	26	988	149

KENYA

Kenya's 1985 crop season has been more favorable than expected. Rainfall in the main cropping areas of central and western Kenya was above normal, and was also well distributed for the corn crop. However, some dryness developed toward the end of the season. Both corn and wheat production are now forecast at high levels. Total 1985 cereal output may increase more than 50 percent over the 1984 drought year and could reach a record.

During 1985/86, Kenya is expected to build sizable corn stocks and small exports are possible. Wheat stocks, however, are low and relatively large wheat imports will be required. Wheat consumption is increasing rapidly, about 9 percent from 1983/84 to 1984/85. Given the good crops, net cereal import requirements for 1985/86 are projected at 232,000 tons, compared with the July estimate of 415,000 tons, and record 1984/85 imports of 867,000 tons.

Kenya's financial condition in 1984/85 was slightly stronger than previously estimated. With commercial import capacity at 173,000 tons, Kenya's status quo additional food needs are down to 59,000 tons for 1985/86, compared with the July estimate of 242,000 tons.

A note of caution regarding financial indicators is that Kenya's financial condition at the end of 1985 may be substantially less favorable than a year ago. Therefore, additional food needs could be higher than currently estimated.

Kenya basic food data

Commodity/year	Actual or forecast production	Begin-ning stocks	Net imports	Nonfeed use	Feed use	Per capita total use	1979-81 Commodity coverage	1979-81 Share of diet
	1,000 tons					Kilos		Percent
Major cereals								
1980/81	2,314	125	504	2,626	68	164	Wheat	5.9
1981/82	2,791	249	340	2,681	82	161	Rice	0.9
1982/83	2,804	617	96	2,667	91	155	Corn	40.2
1983/84	2,543	759	77	2,744	75	152	Sorghum	3.5
1984/85	1,998	560	867	2,826	59	149	Millet	2.2
1985/86	3,075	540	--	--	--	--	Cassava	5.6
1986/87	2,807	540	--	--	--	--	Potatoes	1.3
							Sweet potatoe	2.2
Roots							Total	61.8
1980/81	1,315	0	0	1,315	0	80		
1981/82	1,181	0	0	1,181	0	69		
1982/83	1,341	0	0	1,341	0	75		
1983/84	1,275	0	0	1,275	0	69		
1984/85	1,230	0	0	1,230	0	63		
1985/86	1,330	0	--	--	--	--		
1986/87	1,355	0	--	--	--	--		

Import requirements for Kenya

Commodity/year	Production	Total use		Import requirements		
		Status quo	Nutrition-based	Status quo	Nutrition-based	Maximum
	1,000 tons					
Major cereals						
1985/86	3,075	3,280	3,713	205	638	508
1986/87	2,807	3,244	3,817	437	1,010	914
Roots						
1985/86	1,330	1,395	1,789	65	459	188
1986/87	1,355	1,454	1,864	99	509	227
Cereal equivalent						
1985/86	3,553	3,785	4,354	232	800	542
1986/87	3,293	3,771	4,485	478	1,192	962

Financial indicators for Kenya, actual and projected

Year	Exports and other credits	Imports and other debits	Debt service	International reserves	Foreign exchange available	
					Total	Share to major food imports
	Million dollars					Percent
1980	1,261	2,345	250	492	1,011	14
1981	1,072	1,881	287	231	785	7
1982	934	1,495	326	212	608	14
1983	925	1,204	305	376	620	9
1984	1,034	1,336	348	390	694	NA
1985	985	1,550	282	390	776	10
1986	1,040	1,680	298	390	789	10

Additional food needs to support consumption for Kenya, and as constrained by maximum absorbable imports

Commodity/year	Commercial import capacity		Status quo		Nutrition-based	
	Quantity	Value	Quantity	Value	Quantity	Value
	1,000 tons	Million $	1,000 tons	Million $	1,000 tons	Million $
Major cereals						
Consumption						
1985/86	173	38	59	13	627	137
1986/87	182	38	296	63	1,010	213
Stock adjustment						
1985/86	NA	NA	134	29	134	29
1986/87	NA	NA	28	6	28	6
Total						
1985/86	NA	NA	193	42	761	166
1986/87	NA	NA	324	69	1,038	219
Maximum absorbable						
Cereal equivalent						
1985/86	NA	NA	193	42	369	81
1986/87	NA	NA	324	69	780	165

SOMALIA

For the second consecutive year, Somalia's cereal production reached record volumes in 1985. Corn and sorghum output increased an estimated 4 to 5 percent. Strong production in 1984 followed 1983's drought-diminished crop.

In 1985/56, Somalia will require imports of 245,000 tons of cereals and 47,000 tons of milk under status quo assumptions. Under nutrition-based estimates, 424,000 tons of cereals and 515,000 tons of milk would be required. However, maximum absorption estimates fall below nutrition-based requirements. Despite poor export performance, particularly since 1983 when Saudi Arabia banned livestock imports from Somalia, commercial import capacity for cereals is estimated at 124,000 tons.

Status quo additional food needs are for 120,000 tons of cereals, while nutrition-based estimates are higher, 300,000 tons. Population groups requiring food assistance during 1985/86 include refugees and many of the livestock-dependent nomads.

Somalia basic food data

Commodity/year	Actual or forecast production	Beginning stocks	Net Imports	Nonfeed use	Feed use	Per capita total use	1979-81 Commodity coverage	1979-81 Share of diet
	1,000 tons					Kilos		Percent
Major cereals								
1980/81	264	0	422	675	11	128	Wheat	9.9
1981/82	370	0	382	740	12	127	Rice	9.2
1982/83	399	0	250	637	12	106	Corn	17.2
1983/84	358	0	297	643	12	105	Sorghum	14.3
1984/85	495	0	337	820	12	130	Milk	12.8
1985/86	521	0	--	--	--	--	Total	63.3
1986/87	523	0	--	--	--	--		
Milk								
1980/81	539	0	13	552	0	103		
1981/82	543	0	14	557	0	94		
1982/83	547	0	11	558	0	91		
1983/84	552	0	14	566	0	91		
1984/85	555	0	14	569	0	89		
1985/86	550	0	--	--	--	--		
1986/87	560	0	--	--	--	--		

Import requirements for Somalia

Commodity/year	Production	Total use		Import requirements		
		Status quo	Nutrition-based	Status quo	Nutrition-based	Maximum
	1,000 tons					
Major cereals						
1985/86	521	766	945	245	424	330
1986/87	523	778	959	255	436	342
Milk						
1985/86	550	597	1,065	47	515	66
1986/87	560	607	1,082	47	522	67

Financial indicators for Somalia, actual and projected

Year	Exports and other credits	Imports and other debits	Debt service	International reserves	Foreign exchange available	
					Total	Share to major food imports
	Million dollars					Percent
1980	205	597	9	15	196	17
1981	179	552	25	31	154	44
1982	203	591	24	14	179	18
1983	173	571	30	16	143	34
1984	116	542	27	6	8	NA
1985	161	697	19	6	127	32
1986	212	734	25	6	171	32

Additional food needs to support consumption for Somalia, with stock adjustment, and as constrained by maximum absorbable imports 1/

Commodity/year	Commercial import capacity		Status quo		Nutrition-based	
	Quantity	Value	Quantity	Value	Quantity	Value
	1,000 tons	Million $	1,000 tons	Million $	1,000 tons	Million $
Major cereals						
Consumption						
1985/86	124	29	120	28	300	71
1986/87	173	39	83	19	264	60
Milk						
1985/86	3	6	1	2	43	85
1986/87	4	8	0	0	43	84
Total						
1985/86	NA	35	NA	31	NA	155
1986/87	NA	47	NA	19	NA	144
Maximum absorbable						
Cereal equivalent						
1985/86	NA	NA	120	28	206	49
1986/87	NA	NA	83	19	170	39
Milk						
1985/86	NA	NA	1	2	3	6
1986/87	NA	NA	0	0	2	4
Total						
1985/86	NA	NA	NA	31	NA	54
1986/87	NA	NA	NA	19	NA	42

1/ Reallocation of excess commercial import capacity assigned to the maximum absorbable level of additional grain imports adds to the quantity of milk which may be imported, lowering the additional food need.

SUDAN

Sudan's 1985 sorghum output is expected to reach at least 2.65 million tons, more than twice last year's drought-reduced level and the highest since a record 3.3 million tons were harvested in 1981. Total cereal production should be at least 3.2 million tons, compared with 1.5 million last year. Area and yield increases in the irrigated and mechanized subsectors explain this recovery in output. Exceptional efforts were taken to ensure adequate supplies of seeds and other inputs for the modern subsectors. Drought conditions have ended in most of Sudan with strong rainfall recorded during the 1985 growing season.

In the traditional rainfed subsector, particularly in western Sudan, the area suffering most from food shortages, production of peanuts and food grains is recovering slowly. Despite adequate rainfall, seed shortages and displacement of population will limit output in this subsector.

Status quo import requirements are estimated at 310,000 tons of cereals in 1985/86. Nutrition-based import requirements are 661,000. Due to the exceptional shortages of 1984/85, 1.3 million tons of food grains were imported, most provided as food aid. Sudan allocates a large proportion of its scarce foreign exchange to food imports. As a result, commercial import capacity is estimated at 248,000 tons of cereals in 1985/86. Status quo and nutrition-based additional food requirements above commercial import capacity are 61,000 tons and 413,000 tons, respectively.

Status quo import requirements are low because drought-induced consumption shortfalls occurred in two of the base years. In addition, significant increases in food supplies are needed to rebuild stocks to historical levels and severe nutritional problems are likely to continue. Despite expectations of a good harvest, an estimated 2.5 million people will continue to endure famine-like conditions of considerable proportions in 1986. It is estimated that 413,000 tons of food grains will be required to meet nutritional needs due to significant shortfalls envisioned for the provinces of Kassala, Red Sea, Kordofan, Darfur, and Central/North.

Sudan basic food data

Commodity/year	Actual or forecast production	Beginning stocks	Net imports	Nonfeed use	Feed use	Per capita total use	1979-81 Commodity coverage	1979-81 Share of diet
	1,000 tons					Kilos		Percent
Major cereals								
1980/81	2,816	190	146	2,688	210	155	Wheat	8.0
1981/82	4,045	254	175	3,516	318	198	Rice	0.4
1982/83	2,479	640	164	2,788	198	150	Corn	0.8
1983/84	2,340	297	310	2,735	197	143	Sorghum	32.0
1984/85	1,474	15	1,300	2,552	87	125	Millet	9.6
1985/86	3,245	150	--	--	--	--	Peanuts	12.1
1986/87	3,245	150	--	--	--	--	Total	62.9
Peanuts								
1980/81	707	50	(41)	706	0	38		
1981/82	838	10	(100)	698	0	36		
1982/83	492	50	(70)	442	0	22		
1983/84	413	30	(45)	388	0	19		
1984/85	390	10	0	390	0	18		
1985/86	390	10	--	--	--	--		
1986/87	430	10	--	--	--	--		

Import requirements for Sudan

Commodity/year	Production	Total use: Status quo	Total use: Nutrition-based	Import requirements: Status quo	Import requirements: Nutrition-based	Import requirements: Maximum
	1,000 tons					
Major cereals						
1985/86	3,245	3,414	3,740	169	495	1,198
1986/87	3,245	3,507	3,825	262	580	1,335
Peanuts						
1985/86	390	530	556	140	166	452
1986/87	430	545	588	115	158	434
Cereal equivalent						
1985/86	3,635	3,945	4,296	310	661	1,650
1986/87	3,675	4,051	4,413	376	738	1,769

Financial indicators for Sudan, actual and projected

Year	Exports and other credits	Imports and other debits	Debt service	International reserves	Foreign exchange available: Total	Foreign exchange available: Share to major food imports
	Million dollars					Percent
1980	689	1,127	96	49	594	8
1981	793	1,634	142	17	651	13
1982	401	750	119	21	282	33
1983	514	703	144	17	370	21
1984	519	556	107	17	108	NA
1985	520	1,300	116	17	395	23
1986	650	1,000	145	17	502	23

Additional food needs to support consumption for Sudan, with stock adjustment

Commodity/year	Commercial import capacity: Quantity	Commercial import capacity: Value	Status quo: Quantity	Status quo: Value	Nutrition-based: Quantity	Nutrition-based: Value
	1,000 tons	Million $	1,000 tons	Million $	1,000 tons	Million $
Cereal equivalent						
1985/86	248	41	61	10	413	68
1986/87	326	52	50	8	412	65
Stock adjustment						
1985/86	NA	NA	169	28	169	28
1986/87	NA	NA	94	15	94	15
Total						
1985/86	NA	NA	231	38	583	95
1986/87	NA	NA	145	23	507	80

TANZANIA

Tanzania's main crop season rains in 1985 were better than during the previous year, and above-average coarse grain crops are expected in most areas. The 1985 rice and wheat crops are also estimated above last year. Crops are expected to be particularly good in the south. In some interior locations, however, rainfall dropped below normal. Production forecasts for 1985/86 are increased over the July estimate. Therefore cereal import requirements for 1985/86 are reduced to 218,000 tons, compared with the July estimate of 401,000 tons.

Reports of lower, free market food prices in a number of areas support estimates of improved food supplies in the country. However, the Government is permitting freer movement of food, and this could have been a factor in reducing prices since food movement has improved between surplus and deficit areas. In October 1984, official producer food crop prices were increased by more than the inflation rate of 30 percent. This may have worked as an incentive in bringing about increased food production in 1985.

Cereal consumption is estimated to have been at a very low level during 1984/85. And despite the large increase in 1985 cereal production, imports will be required to raise consumption to a more normal level.

Tanzania's international reserves--although still very small at the end of 1984--were larger than previously estimated, and the commercial import capacity is up slightly to 89,000 tons. Status quo additional food needs for 1985/86 are therefore down to 116,000 tons, compared with the July estimate of 334,000 tons. It should be noted that a poor export performance is expected for 1985. In addition, Tanzania's international reserves have recently dropped. Thus, additional food need estimates could be higher in the future.

Tanzania basic food data

Commodity/year	Actual or forecast production	Beginning stocks	Net imports	Nonfeed use	Feed use	Per capita total use	1979-81 Commodity coverage	1979-81 Share of diet
	1,000 tons					Kilos		Percent
Major cereals								
1980/81	2,160	86	387	2,443	70	135	Wheat	2.7
1981/82	2,530	120	364	2,859	70	153	Rice	5.1
1982/83	2,406	85	164	2,558	65	133	Corn	21.3
1983/84	2,276	32	355	2,581	58	129	Sorghum	1.2
1984/85	2,119	24	271	2,341	57	114	Millet	1.6
1985/86	2,655	16	--	--	--	--	Cassava	30.5
1986/87	2,777	16	--	--	--	--	Total	62.3
Roots								
1980/81	5,631	0	0	5,631	0	303		
1981/82	6,000	0	0	6,000	0	313		
1982/83	5,000	0	0	5,000	0	253		
1983/84	5,400	0	0	5,400	0	265		
1984/85	5,600	0	0	5,600	0	266		
1985/86	6,000	0	--	--	--	--		
1986/87	6,150	0	--	--	--	--		

Import requirements for Tanzania

Commodity/year	Production	Total use: Status quo	Total use: Nutrition-based	Import requirements: Status quo	Import requirements: Nutrition-based	Import requirements: Maximum
	1,000 tons					
Major cereals						
1985/86	2,655	2,873	2,523	218	(132)	819
1986/87	2,777	2,966	2,600	189	(177)	804
Roots						
1985/86	6,000	5,959	7,067	(41)	1,067	804
1986/87	6,150	6,150	7,288	0	1,138	873
Cereal equivalent						
1985/86	4,575	4,780	4,785	205	210	1,077
1986/87	4,745	4,934	4,932	189	187	1,084

Financial indicators for Tanzania, actual and projected

Year	Exports and other credits	Imports and other debits	Debt service	International reserves	Foreign exchange available: Total	Foreign exchange available: Share to major food imports
	Million dollars					Percent
1980	508	1,069	51	20	456	18
1981	688	1,037	47	19	641	5
1982	413	1,093	53	5	360	13
1983	359	799	78	19	281	17
1984	395	831	71	27	210	NA
1985	395	850	51	27	355	12
1986	413	950	53	27	369	12

Additional food needs to support consumption for Tanzania, with stock adjustment

Commidity/year	Commercial import capacity: Quantity	Commercial import capacity: Value	Status quo: Quantity	Status quo: Value	Nutrition-based: Quantity	Nutrition-based: Value
	1,000 tons	Million $	1,000 tons	Million $	1,000 tons	Million $
Cereal equivalent						
Consumption						
1985/86	89	22	116	28	121	29
1986/87	96	22	93	22	91	21
Stock adjustment						
1985/86	NA	NA	24	6	24	6
1986/87	NA	NA	16	4	16	4
Total						
1985/86	NA	NA	140	34	145	35
1986/87	NA	NA	109	26	108	25

Southern Africa

MADAGASCAR

Madagascar's additional food needs for 1985/86 have decreased approximately 30 percent from the July estimate. This is due to a slight increase in the rice production estimate, coupled with an increase in commercial import capacity. The latter resulted from an improved balance of merchandise trade as forecast exports increased while imports decreased.

Madagascar basic food data

Commodity/year	Actual or forecast production	Begin-ning stocks	Net imports	Nonfeed use	Feed use	Per capita total use	1979-81 Commodity coverage	1979-81 Share of diet
	1,000 tons					Kilos		Percent
Major cereals								
1980/81	1,477	0	271	1,748	0	202	Wheat	1.9
1981/82	1,408	0	433	1,841	0	207	Rice	55.7
1982/83	1,460	0	242	1,702	0	186	Corn	4.0
1983/84	1,522	0	138	1,660	0	177	Total	61.6
1984/85	1,502	0	145	1,647	0	170		
1985/86	1,470	0	--	--	--	--		
1986/87	1,500	0	--	--	--	--		

Import requirements for Madagascar

Commodity/year	Production	Total use		Import requirements		
		Status quo	Nutrition-based	Status quo	Nutrition-based	Maximum
	1,000 tons					
Cereal equivalent						
1985/86	1,470	1,840	1,716	370	246	589
1986/87	1,500	1,892	1,763	392	263	618

Financial indicators for Madagascar, actual and projected

Year	Exports and other credits	Imports and other debits	Debt service	International reserves	Foreign exchange available: Total	Foreign exchange available: Share to major food imports
	Million dollars					Percent
1980	436	764	59	9	377	11
1981	324	511	44	27	280	31
1982	329	462	58	20	271	35
1983	319	400	141	29	178	25
1984	325	380	117	42	56	NA
1985	360	395	80	42	296	30
1986	365	415	81	42	299	30

Additional food aid needs to support consumption for Madagascar

Commodity/year	Commerical import capacity: Quantity	Commerical import capacity: Value	Status quo: Quantity	Status quo: Value	Nutrition-based: Quantity	Nutrition-based: Value
	1,000 tons	Million $	1,000 tons	Million $	1,000 tons	Million $
Cereal equivalent Consumption						
1985/86	309	73	61	14	0	0
1986/87	323	74	69	16	0	0

MOZAMBIQUE

The availability of food has increased in Mozambique in 1985, but the situation remains fragile. Total import requirements for 1985/86 are estimated at 440,000 tons to maintain status quo consumption, 30,000 tons lower than the previous estimate. To reach adequate nutritional levels, though, these requirements would more than triple. Actual cereal imports for 1984/85 were lower than forecast, after 100,000 tons of cereal aid pledged for 1984/85 did not arrive on time. This dropped base period consumption levels and accounted for the revision in import needs.

Food aid has played an important role in relieving the worst hunger problems in the last 2 years and will remain essential because of the economy's weakness and anticipated slow agricultural growth. Serious constraints limit the potential for major improvement in the near future. Widespread fighting continues and this disruption overwhelms the impact of many positive reforms. Shortages of inputs, including seed, marketing and distribution problems, and shortages of consumer goods could continue to hold back agricultural production. However, current economic adjustment efforts are encouraging, including more support for the smallholder or "family" sector of agriculture. Recently, Mozambique decontrolled prices for a number of agricultural commodities, while raising both producer and retail prices for many others.

Recent financial data underscore the severity of Mozambique's economic crisis. Total outstanding debt at the end of 1984 reached $2.4 billion, including arrears. Export earnings have declined to very low levels and the ratio of debt service to exports for 1984 was estimated at well over 200 percent, again including arrears. Extensive debt rescheduling has been required, along with concessionary assistance, while the country has nearly depleted its foreign reserves.

Mozambique basic food data

Commodity/year	Actual or forecast production	Begin-ning stocks	Net Imports	Nonfeed use	Feed use	Per capita total use	1979-81 Commodity coverage	1979-81 Share of diet
	1,000 tons					Kilos		Percent
Major cereals								
1980/81	538	0	409	947	0	78	Wheat	6.2
1981/82	604	0	370	974	0	79	Rice	5.8
1982/83	569	0	373	942	0	74	Corn	15.5
1983/84	372	0	468	840	0	64	Sorghum	5.6
1984/85	429	0	481	910	0	68	Millet	0.2
1985/86	563	0	—	—	—	—	Cassava	39.7
1986/87	628	0	—	—	—	—	Total	73.0
Roots								
1980/81	2,800	0	0	2,800	0	231		
1981/82	2,850	0	0	2,850	0	230		
1982/83	2,900	0	0	2,900	0	228		
1983/84	2,300	0	0	2,300	0	176		
1984/85	2,600	0	0	2,600	0	194		
1985/86	2,800	0	--	--	--	--		
1986/87	2,950	0	--	--	—	—		

Import requirements for Mozambique

Commodity/year	Production	Total use: Status quo	Total use: Nutrition-based	Import requirements: Status quo	Import requirements: Nutrition-based	Import requirements: Maximum
	1,000 tons					
Major cereals						
1985/86	563	982	1,325	419	762	521
1986/87	628	1,009	1,366	381	738	486
Roots						
1985/86	2,800	2,854	4,387	54	1,587	374
1986/87	2,950	2,932	4,510	(18)	1,560	311
Cereal equivalent						
1985/86	1,686	2,126	3,084	440	1,398	671
1986/87	1,811	2,185	3,175	374	1,364	611

Financial indicators for Mozambique, actual and projected

Year	Exports and other credits	Imports and other debits	Debt service	International reserves	Foreign exchange available: Total	Foreign exchange available: Share to major food imports
	Million dollars					Percent
1980	434	800	91	268	343	20
1981	392	801	214	206	178	16
1982	339	836	226	71	112	39
1983	221	636	189	60	32	91
1984	228	539	165	72	63	NA
1985	210	720	120	72	57	49
1986	275	780	157	72	77	49

Additional food needs to support consumption for Mozambique, and as constrained by maximum absorbable imports

Commodity/year	Commercial import capacity: Quantity	Commercial import capacity: Value	Status quo: Quantity	Status quo: Value	Nutrition-based: Quantity	Nutrition-based: Value
	1,000 tons	Million $	1,000 tons	Million $	1,000 tons	Million $
Cereal equivalent						
Consumption						
1985/86	119	20	321	54	1,279	214
1986/87	165	27	209	34	1,199	194
Maximum absorbable						
Cereal equivalent						
1985/86	NA	NA	321	54	552	93
1986/87	NA	NA	209	34	446	72

BANGLADESH

Bangladesh's 1985/86 rice crop is now forecast at 15 million tons, 2 percent above the previous forecast and 3.3 percent above the 1984/85 record. Forecasts of other food grain and oilseed crops are unchanged. Revised data for 1984/85 indicate that imports, total consumption, and per capita consumption of food grains were significantly lower than estimated previously. In addition, actual closing stocks at the end of 1984/85 were 1.07 million tons, more than 30 percent above earlier estimates and only about 100,000 tons below the government target. These revisions in 1984/85 data have the effect of reducing the earlier estimates of food grain needed to support status quo consumption and build stocks in 1985/86 and 1986/87, and also reducing earlier estimates of the maximum food grain imports that could be absorbed.

Status quo-based import needs to support consumption for 1985/86 are now estimated at 2.0 million tons of food grains, compared with the previous estimate of 2.5 million. Nutrition-based import needs are estimated at 4.9 million tons, down marginally from the previous estimate of 5.1 million. Import needs for stock-building are now estimated to be negligible. Maximum absorbable imports of food grains are now placed at about 2.6 million tons, down sharply from the earlier estimate of 3.6 million, largely because of higher opening stocks and a lower estimate of the maximum level of per capita consumption during the base period. Import requirements for vegetable oils are marginally lower than previous estimates.

Revised balance of payments forecasts indicate a slight increase over previous estimates in Bangladesh's ability to import food commercially in 1985 and 1986. Exports of jute goods and nontraditional items are expected to rise more rapidly than previously expected, allowing somewhat stronger growth in outlays for imports of capital goods and necessary consumer items. However, Bangladesh's balance of payments will continue to be pressured by a large merchandise trade deficit and slowed growth in foreign remittances, and large infusions of foreign aid will remain necessary to maintain economic growth.

To support status quo consumption in 1985/86, additional food needs are now estimated at 1.6 million tons of wheat and rice and 34,000 tons of edible oils, compared with previous estimates of 2.0 million tons and 51,000 tons, respectively. Additional food needs to meet the nutrition-based consumption target are now estimated at 4.4 million tons of cereals and 29,000 tons of edible oils, both down slightly from previous estimates. However, because of a lower estimate of maximum absorbable imports, maximum absorbable additional food needs are now set at 2.1 million tons of cereals, about 1 million tons below the earlier estimate. The total value of estimated status quo additional food needs is now $378 million, down 23 percent from the previous estimate, while the total value of maximum absorbable nutrition-based additional food needs is down 33 percent to $487 million.

Bangladesh basic food data

Commodity/year	Actual or forecast production	Beginning stocks	Net imports	Nonfeed use	Feed use	Per capita total use	1979-81 Commodity coverage	1979-81 Share of diet
	1,000 tons					Kilos		Percent
Major cereals								
1980/81	14,975	787	1,077	15,587	0	177	Wheat	8.8
1981/82	14,598	1,252	1,235	16,470	0	182	Rice	76.3
1982/83	15,311	615	1,817	17,117	0	183	Vegetable	
1983/84	15,710	626	2,056	17,592	0	183	oil	2.2
1984/85	15,974	800	2,714	18,415	0	187	Total	87.3
1985/86	16,500	1,073	--	--	--	--		
1986/87	16,700	1,073	--	--	--	--		
Vegetable oils								
1980/81	56	18	140	161	0	2		
1981/82	54	53	144	200	0	2		
1982/83	55	51	147	190	0	2		
1983/84	56	63	141	189	0	2		
1984/85	60	71	101	191	0	2		
1985/86	61	41	--	--	--	--		
1986/87	60	41	--	--	--	--		

Import requirements for Bangladesh

Commodity/year	Production	Total use: Status quo	Total use: Nutrition-based	Import requirements: Status quo	Import requirements: Nutrition-based	Import requirements: Maximum
	1,000 tons					
Cereals						
1985/86	16,500	18,543	21,359	2,043	4,859	2,562
1986/87	16,700	19,003	21,862	2,303	5,162	2,831
Vegetable oils						
1985/86	61	206	200	145	139	191
1986/87	60	211	205	151	145	198

Financial indicators for Bangladesh, actual and projected

Year	Exports and other credits	Imports	Debt service	International reserves	Foreign exchange available: Total	Foreign exchange available: Share to major food imports
	Million dollars					Percent
1980	1,090	2,533	91	221	999	16
1981	1,051	2,572	87	157	964	17
1982	1,314	2,317	120	332	1,194	22
1983	1,374	2,353	168	516	1,206	20
1984	1,335	2,700	172	388	1,139	NA
1985	1,440	2,735	226	360	1,191	20
1986	1,500	2,800	243	350	1,215	20

Additional food needs to support consumption for Bangladesh, with stock adjustment and as constrained by maximum absorbable imports 1/

Commodity/year	Commercial import capacity		Status quo		Nutrition-based	
	Quantity	Value	Quantity	Value	Quantity	Value
	1,000 tons	Million $	1,000 tons	Million $	1,000 tons	Million $
Cereal equivalent						
Consumption						
1985/86	473	104	1,570	347	4,386	968
1986/87	499	106	1,804	385	4,663	995
Stock adjustment						
1985/86	NA	NA	7	2	7	2
1986/87	NA	NA	27	6	27	6
Total						
1985/86	NA	NA	1,577	348	4,394	970
1986/87	NA	NA	1,830	391	4,689	1,001
Vegetable oils						
1985/86	110	95	34	29	29	25
1986/87	133	96	18	13	12	8
Total						
1985/86	NA	199	NA	378	NA	994
1986/87	NA	203	NA	403	NA	1,009
Maximum absorbable						
Cereal equivalent						
1985/86	NA	NA	1,577	348	2,097	463
1986/87	NA	NA	1,830	391	2,358	503
Vegetable oils						
1985/86	NA	NA	34	29	29	25
1986/87	NA	NA	18	13	12	8
Total						
1985/86	NA	NA	NA	378	NA	487
1986/87	NA	NA	NA	403	NA	512

1/ Reallocation of excess commercial import capacity assigned to the maximum absorbable level of additional grain imports adds to the quantity of vegetable oils which may be imported, lowering the additional food need.

INDIA

Record cereal and edible oil crops are still expected in India during 1985/86. The 1985 wheat harvest is estimated at a near-record 45 million tons and the 1985/86 rice crop, benefiting from generally favorable 1985 monsoon rainfall, is forecast at a record 60 million tons. However, dry weather in some rainfed producing regions has led to marginal reductions in estimates of the 1985 pulse crop and 1985/86 coarse grain harvests. Revised data for the 1984/85 marketing year indicate that wheat exports were smaller than previously expected. In addition, record domestic procurement and sluggish demand for government subsidized cereals led to even larger stocks than were forecast earlier. Government stocks of wheat and rice as of July 1985 totaled nearly 30 million tons, well in excess of the 21-million-ton target and available storage capacity. Edible oil production during 1985/86 is now forecast at a record of nearly 3.8 million tons, about 3 percent above the previous forecast, because an expected larger rape and mustard seed harvest. However, poor weather in key peanut producing regions could lead to a downward revision in this forecast.

Status quo import requirements for cereals for 1985/86 continue to be estimated at zero, while the nutrition-based estimate has increased to about 4.1 million tons because of the lower coarse grain production estimate. Import requirements for edible oils have declined because of the improved outlook for domestic production and a lower estimate of actual imports during 1984/85. The lower pulse production estimate has boosted pulse import needs.

Revised balance of payments estimates indicate little change in India's capacity to import food commercially in 1985 and 1986, compared with earlier estimates. However, continued efforts to liberalize imports, and a poor outlook for further growth in foreign remittances, are likely to keep India's balance of payments position tight in 1985 and 1986.

Both status quo- and nutrition-based estimates continue to indicate that India's additional food needs in the form of cereals, edible oils, and pulses will be negligible in 1985/86. Maximum absorbable additional food needs in the form of cereals, pulses, and edible oils are forecast at zero. The large cereal surplus will likely eliminate the need to allocate foreign exchange to wheat or rice imports for at least the next several years. As a result, it is not likely that even sharply reduced cereal, oilseed, or pulse production estimates would lead to significant status quo additional food needs, or absorbable nutrition-based additional food needs, in 1985/86 or 1986/87.

India basic food data

Commodity/year	Actual or forecast production	Begin-ning stocks	Net imports	Nonfeed use	Feed use	Per capita total use	1979-81 Commodity coverage	1979-81 Share of diet
	1,000 tons					Kilos		Percent
Major cereals 1/								
1980/81	113,810	17,561	(835)	112,937	2,320	168	Wheat	18.5
1981/82	120,949	15,279	1,546	118,384	2,420	172	Rice	33.2
1982/83	112,446	16,970	3,477	111,722	2,420	159	Corn	3.1
1983/84	136,616	18,751	3,160	131,268	2,520	182	Sorghum	5.8
1984/85	135,935	24,739	(305)	127,319	2,570	173	Millet	5.2
1985/86	137,800	30,480	--	--	--	--	Barley	0.7
1986/87	142,400	30,480	--	--	--	--	Pulses	5.8
							Vegetable oils	6.3
Vegetable oils							Total	78.7
1980/81	2,668	160	1,322	3,980	0	6		
1981/82	3,392	170	862	4,244	0	6		
1982/83	2,974	180	1,373	4,357	0	6		
1983/84	3,403	170	1,684	4,947	0	7		
1984/85	3,678	310	1,175	4,963	0	7		
1985/86	3,765	200	--	--	--	--		
1986/87	3,850	200	--	--	--	--		
Pulses								
1980/81	8,572	0	173	8,595	150	13		
1981/82	10,627	0	128	10,605	150	15		
1982/83	11,507	0	150	11,507	150	16		
1983/84	11,857	0	300	12,057	100	17		
1984/85	12,655	0	200	12,755	100	17		
1985/86	12,200	0	--	--	--	--		
1986/87	12,800	0	--	--	--	--		

1/ Cereal stock data are for government stocks as of July 1.

Import requirements for India

Commodity/year	Production	Total use		Import requirements		
		Status quo	Nutrition-based	Status quo	Nutrition-based	Maximum
	1,000 tons					
Cereal equivalent						
1985/86	137,800	131,468	141,869	(6,332)	4,069	1,836
1986/87	142,400	134,228	145,088	(8,172)	2,688	168
Vegetable oils						
1985/86	3,765	4,878	4,547	1,113	782	1,508
1986/87	3,850	4,980	4,643	1,130	793	1,532
Pulses						
1985/86	12,200	12,497	12,519	297	319	925
1986/87	12,800	12,760	12,819	(40)	19	601

Financial indicators for India, actual and projected

Year	Exports	Imports	Debt service	International reserves	Foreign exchange available	
					Total	Share to major food imports
	Million dollars					Percent
1980	7,948	11,383	1,034	7,204	6,914	12
1981	8,504	16,024	1,085	6,859	7,419	15
1982	8,778	15,560	1,061	4,461	7,717	13
1983	9,498	15,498	1,328	4,965	8,170	19
1984	10,056	15,741	1,461	5,847	7,769	NA
1985	10,300	16,000	1,800	6,150	9,013	16
1986	11,000	17,000	2,100	5,700	8,611	16

Additional food needs to support consumption for India, with stock adjustment and as constrained by maximum absorbable imports 1/

Commodity/year	Commercial import capacity		Status quo		Nutrition-based	
	Quantity	Value	Quantity	Value	Quantity	Value
	1,000 tons	Million $	1,000 tons	Million $	1,000 tons	Million $
Cereal equivalent						
Consumption						
1985/86	2,915	568	0	0	95	18
1986/87	2,881	542	0	0	0	0
Stock adjustment						
1985/86	NA	NA	0	0	370	72
1986/87	NA	NA	0	0	0	0
Total						
1985/86	NA	NA	0	0	465	91
1986/87	NA	NA	0	0	0	0
Vegetable oils						
1985/86	1,054	800	0	0	0	0
1986/87	1,192	764	0	0	0	0
Pulses						
1985/86	102	43	0	0	217	90
1986/87	103	41	0	0	0	0
Total						
1985/86	NA	1,410	NA	0	NA	181
1986/87	NA	1,347	NA	0	NA	0
Maximum absorbable						
Cereal equivalent						
1985/86	NA	NA	0	0	0	0
1986/87	NA	NA	0	0	0	0
Vegetable oils						
1985/86	NA	NA	0	0	0	0
1986/87	NA	NA	0	0	0	0
Pulses						
1985/86	NA	NA	0	0	0	0
1986/87	NA	NA	0	0	0	0
Total						
1985/86	NA	NA	NA	0	NA	0
1986/87	NA	NA	NA	0	NA	0

1/ Commercial import capacity surplus to maximum absorbable import requirements or additional food needs in individual commodity groups is offset by additional needs in other commodity groups.

PAKISTAN

Pakistan's 1985 wheat harvest is now estimated at 11.6 million tons, 6 percent above 1984 and more than 5 percent higher than the previous estimate. Higher yields in irrigated areas more than offset losses in rainfed regions resulting from a second consecutive year of dry winter weather. However, production remains well below the record and the government target. Because of the higher wheat production estimate, wheat import needs to support status quo consumption are now placed at 1.0 million tons, down significantly from the previous estimate of 1.6 million. Estimated nutrition-based import needs have fallen a similar amount to about 2.0 million tons. About 100,000 tons of these import needs could be met by drawing down stocks without jeopardizing Pakistan's food security position. Edible oil production in 1985/86 is now expected to be about 6 percent below previous forecasts, primarily because of a smaller cotton crop, leading to slightly higher import requirements for edible oils.

Revised forecasts of Pakistan's balance of payments indicate substantial deterioration in Pakistan's ability to import food commercially in 1985 and 1986. Foreign exchange earnings fell sharply in 1985 because of weak prices for cotton and rice exports and slowed growth in worker remittances, leading to a 50-percent drop in foreign reserves. Only a limited recovery is projected for 1986. Capacity to import food items commercially in 1985 without jeopardizing outlays for nonfood imports is now estimated at about $317 million, 23 percent below the previous estimate.

The higher estimate of wheat production has offset lower forecasts of edible oil output and commercial import capacity, and the total estimated value of both status quo- and nutrition-based additional food needs is nearly unchanged from the previous estimates. Current forecasts indicate smaller additional food needs in the form of wheat and larger needs in the form of edible oils, compared with previous estimates. However, these calculations are based on historical allocations of available foreign exchange to commercial food grain and edible oil imports, which need not be maintained in the future. Additional food needs during 1985/86 could be met with an alternate mix of wheat and edible oils than is specified in the tables.

Pakistan basic food data

Commodity/year	Actual or forecast production	Begin-ning stocks	Net imports	Nonfeed use	Feed use	Per capita total use	1979-81 Commodity coverage	1979-81 Share of diet
	1,000 tons					Kilos		Percent
Major cereals								
1980/81	14,926	1,248	(843)	13,997	130	166	Wheat	47.2
1981/82	15,833	1,204	(494)	14,394	130	164	Rice	10.5
1982/83	15,754	2,019	(654)	14,646	130	162	Corn	3.3
1983/84	16,773	2,343	(984)	15,210	130	163	Pulses	2.2
1984/85	15,419	2,792	89	15,662	130	163	Vegetable	
1985/86	16,143	2,508	--	--	--	--	oils	7.7
1986/87	17,850	2,508	--	--	--	--	Total	70.9
Vegetable oils								
1980/81	223	85	506	742	0	9		
1981/82	238	72	604	854	0	10		
1982/83	254	60	588	833	0	9		
1983/84	188	69	719	899	0	10		
1984/85	291	77	713	1,004	0	10		
1985/86	246	77	--	--	--	--		
1986/87	280	77	--	--	--	--		
Pulses								
1980/81	526	0	0	496	30	6		
1981/82	481	0	0	431	50	5		
1982/83	703	0	0	651	52	8		
1983/84	733	0	0	683	50	8		
1984/85	760	0	0	710	50	8		
1985/86	760	0	--	--	--	--		
1986/87	780	0	--	--	--	--		

Import requirements for Pakistan

Commodity/year	Production	Total use: Status quo	Total use: Nutrition-based	Import requirements 1/: Status quo	Import requirements 1/: Nutrition-based	Import requirements 1/: Maximum
	1,000 tons					
Cereal equivalent						
1985/86	17,143	17,171	17,370	1,019	1,955	1,424
1986/87	17,850	16,598	17,922	(274)	783	134
Vegetable oils						
1985/86	246	960	760	714	514	793
1986/87	280	985	783	705	503	786
Pulses						
1985/86	760	714	740	(46)	(20)	20
1986/87	780	732	759	(48)	(21)	21

1/ Cereal equivalent import requirements and import maximums are net of traditional rice exports.

Financial indicators for Pakistan, actual and projected

Year	Exports and other credits	Imports	Debt service	International reserves	Foreign exchange available: Total	Foreign exchange available: Share to major food imports
	Million dollars					Percent
1980	4,832	4,857	693	748	4,139	7
1981	5,840	5,563	743	1,058	5,097	7
1982	5,478	5,769	791	762	4,687	10
1983	6,486	5,616	879	1,848	5,607	8
1984	6,518	5,690	1,021	931	5,130	NA
1985	5,930	5,929	1,150	850	4,216	8
1986	6,550	6,500	1,250	850	4,600	8

Additional food needs to support consumption for Pakistan, with stock adjustment and as constrained by maximum absorbable imports 1/

Commodity/year	Commercial import capacity : Quantity	Commercial import capacity : Value	Status quo : Quantity	Status quo : Value	Nutrition-based : Quantity	Nutrition-based : Value
	1,000 tons	Million $	1,000 tons	Million $	1,000 tons	Million $
Cereal equivalent						
Consumption						
1985/86	266	49	573	105	1,509	276
1986/87	301	53	0	0	279	49
Stock adjustment						
1985/86	NA	NA	(100)	(18)	(100)	(18)
1986/87	NA	NA	0	0	247	44
Total						
1985/86	NA	NA	473	86	1,409	257
1986/87	NA	NA	0	0	526	93
Vegetable oils						
1985/86	336	236	378	265	178	125
1986/87	434	257	121	72	69	41
Pulses						
1985/86	62	33	0	0	0	0
1986/87	71	36	0	0	0	0
Total						
1985/86	NA	317	NA	351	NA	382
1986/87	NA	346	NA	72	NA	134
Maximum absorbable						
Cereal equivalent						
1985/86	NA	NA	473	86	878	160
1986/87	NA	NA	0	0	80	14
Vegetable oils						
1985/86	NA	NA	378	265	178	125
1986/87	NA	NA	121	72	0	0
Pulses						
1985/86	NA	NA	0	0	0	0
1986/87	NA	NA	0	0	0	0
Total						
1985/86	NA	NA	NA	351	NA	285
1986/87	NA	NA	NA	72	NA	14

1/ Commercial import capacity surplus to maximum absorbable import requirements or additional food needs in individual commodity groups is offset by additional needs in other commodity groups.

SRI LANKA

Poor weather and disruptions caused by civil unrest are expected to deal a second consecutive setback to rice production in Sri Lanka. The 1985 rice crop is now estimated at 1.61 million tons, 2 percent below 1984 and more than 5 percent below the previous forecast. Estimates for other 1985 crops are unchanged. Status quo-based cereal import needs are now placed at 719,000 tons, up 14 percent from the earlier estimate, while nutrition-based needs are up a similar amount to 749,000 tons. Cereal import needs for stock-building are estimated at 29,000 tons.

Revisions in historical and projected balance of payments indicators have resulted in a 7-percent drop in Sri Lanka's estimated capacity to import food commercially in 1985. The large gain in exports achieved in 1984, based largely on high world tea prices, is not expected to be sustained in 1985 and 1986, leading to a decline in foreign reserves.

Despite lower estimates of rice production and commercial import capacity, Sri Lanka's status-quo based additional food needs to support consumption in 1985/86 continue to be estimated at zero. Nutrition-based needs are now estimated at 22,000 tons of cereals. Additional food needs, including import needs for stock-building, are 21,000 according to the status quo estimate, and 51,000 tons according to the nutrition-based estimate.

Sri Lanka basic food data

Commodity/year	Actual or forecast production	Beginning stocks	Net imports	Nonfeed use	Feed use	Per capita total use	1979-81 Commodity coverage	1979-81 Share of diet
	1,000 tons					Kilos		Percent
Major cereals								
1980/81	1,450	254	692	2,198	0	146	Wheat	13.8
1981/82	1,469	198	663	2,142	0	139	Rice	42.0
1982/83	1,466	188	789	2,226	0	142	Cassava	3.0
1983/84	1,688	217	728	2,317	0	145	Vegetable	
1984/85	1,640	316	620	2,350	0	145	oils	3.5
1985/86	1,608	226	NA	NA	NA	NA	Total	62.3
1986/87	1,750	226	NA	NA	NA	NA		
Roots								
1980/81	334	0	0	334	0	22		
1981/82	440	0	0	440	0	29		
1982/83	638	0	0	638	0	41		
1983/84	738	0	0	738	0	46		
1984/85	750	0	0	750	0	46		
1985/86	750	0	--	--	--	--		
1986/87	750	0	--	--	--	--		
Vegetable oils								
1980/81	78	0	(5)	73	0	5		
1981/82	103	0	(35)	68	0	4		
1982/83	83	0	(25)	58	0	4		
1983/84	37	0	(1)	36	0	2		
1984/85	89	0	(22)	67	0	4		
1985/86	92	0	--	--	--	--		
1986/87	94	0	--	--	--	--		

Import requirements for Sri Lanka

Commodity/year	Production	Total use		Import requirements		
		Status quo	Nutrition-based	Status quo	Nutrition-based	Maximum
	1,000 tons					
Cereals						
1985/86	1,608	2,359	2,406	751	798	989
1986/87	1,750	2,401	2,458	651	708	889
Roots						
1985/86	750	668	625	(82)	(125)	14
1986/87	750	680	632	(70)	(118)	28
Cereal equivalent						
1985/86	1,902	2,621	2,651	719	749	994
1986/87	2,044	2,667	2,706	623	662	900
Vegetable oils						
1985/86	92	60	79	(32)	(13)	(19)
1986/87	94	61	80	(33)	(14)	(20)

Financial indicators for Sri Lanka, actual and projected

Year	Exports	Imports	Debt service	International reserves	Foreign exchange available	
					Total	Share to major food imports
	Million dollars					Percent
1980	1,062	1,845	82	246	980	18
1981	1,062	1,694	93	327	969	18
1982	1,014	1,794	137	351	877	13
1983	1,062	1,929	154	297	908	14
1984	1,472	1,873	202	510	918	NA
1985	1,375	1,950	224	400	1,154	15
1986	1,500	2,140	248	450	1,266	15

Additional food needs to support consumption for Sri Lanka, with stock adjustment 1/

Commodity/year	Commercial import capacity		Status-quo		Nutrition-based	
	Quantity	Value	Quantity	Value	Quantity	Value
	1,000 tons	Million $	1,000 tons	Million $	1,000 tons	Million $
Cereal equivalent						
Consumption						
1985/86	722	129	0	0	22	4
1986/87	819	141	0	0	0	0
Stock adjustment						
1985/86	NA	NA	29	5	29	5
1986/87	NA	NA	0	0	0	0
Total						
1985/86	NA	NA	21	4	51	9
1986/87	NA	NA	0	0	0	0
Vegetable oils						
1985/86	2	1	0	0	0	0
1986/87	3	1	0	0	0	0
Total						
1985/86	NA	130	NA	4	NA	9
1986/87	NA	142	NA	0	NA	0

1/ Commercial import capacity surplus to additional food needs in individual commodity groups is offset by additional needs in other commodity groups.

THE PHILIPPINES

The Philippines' cereal production estimate for 1985/86 has been revised downward by 200,000 tons to 8.89 million, because low corn prices and high interest rates are expected to discourage corn planting. This revision increases 1985/86 status quo cereal import requirements by 12.8 percent to 1.57 million tons. Estimated nutrition-based cereal import requirements have fallen slightly to 1.69 million tons, with lower estimates of feed use offsetting the lower production forecast. Higher corn stocks have dropped requirements for food security stock-building by one-third to 206,000 tons.

The Philippines' ability to finance imports has deteriorated sharply, largely because of poor export performance during the first half of 1985. Instead of the projected 5-percent increase from last year, export earnings are likely to fall because of lower coconut oil prices and a 30-percent drop in export volume, weak demand for garments and semi-conductors, and a relatively strong peso.

With these revisions, estimated 1985/86 additional food needs to maintain status quo consumption and permit stock-building have risen by 77 percent to about 1.1 million tons. About 1.5 million tons of additional food would be needed to achieve the FAO recommended minimum diet, surpassing the earlier projection by 243,000 tons. Because the Philippines' financial situation is likely to remain fragile into 1986/87, and no improvement is likely in commercial import capacity, food needs are projected to remain high in 1986/87.

Philippines basic food data

Commodity/year	Actual or forecast production	Begin-ning stocks	Net imports	Nonfeed use	Feed use	Per capita total use	1979-81 Commodity coverage	1979-81 Share of diet
	1,000 tons					Kilos		Percent
Major cereals								
1980/81	8,130	1,879	1,054	7,273	2,015	189	Rice	39.4
1981/82	8,560	1,775	1,132	7,577	2,120	192	Corn	9.4
1982/83	8,151	1,770	1,320	7,683	2,073	188	Wheat	5.4
1983/84	8,443	1,485	994	7,918	1,850	184	Cassava	5.7
1984/85	8,737	1,154	1,572	8,188	1,900	185	Coconut oil	3.3
1985/86	8,886	1,375	--	--	--	--	Sweet potato	2.6
1986/87	9,320	1,375	--	--	--	--	Total	65.7
Roots								
1980/81	3,325	0	0	3,325	0	68		
1981/82	3,265	0	0	3,265	0	65		
1982/83	3,027	0	0	3,027	0	58		
1983/84	2,702	0	0	2,702	0	51		
1984/85	3,050	0	0	3,050	0	56		
1985/86	3,125	0	--	--	--	--		
1986/87	3,200	0	--	--	--			
Vegetable oils								
1980/81	1,072	90	(914)	182	0	4		
1981/82	1,250	66	(1,047)	204	0	4		
1982/83	1,246	65	(949)	292	0	6		
1983/84	1,225	70	(1,020)	235	0	4		
1984/85	866	40	(586)	235	0	4		
1985/86	1,084	111	--	--	--	--		
1986/87	1,201	111	--	--	--	--		

Import requirements for Philippines

Commodity/year	Production	Total use		Import requirements		
		Status quo	Nutrition-based	Status quo	Nutrition-based	Maximum
		1,000 tons				
Major cereals						
1985/86	8,886	10,456	10,577	1,570	1,691	2,333
1986/87	9,320	10,718	10,873	1,398	1,553	2,166
Roots						
1985/86	3,125	3,208	3,952	83	827	483
1986/87	3,200	3,288	4,051	88	851	498
Cereal equivalent						
1985/86	10,030	11,630	12,024	1,601	1,994	2,510
1986/87	10,491	11,921	12,356	1,430	1,865	2,349
Vegetable oils						
1985/86	1,084	257	594	(827)	(490)	(769)
1986/87	1,201	263	645	(938)	(556)	(879)

Financial indicators for Philippines, actual and projected

Year	Exports	Imports	Debt service	International reserves	Foreign exchange available	
					Total	Share to major food imports
	Million dollars					Percent
1980	5,789	7,726	1,672	3,155	4,117	8
1981	5,722	7,946	2,168	2,573	3,554	9
1982	5,021	7,667	3,049	1,815	1,972	17
1983	5,005	7,490	2,904	1,075	2,101	16
1984	5,391	6,070	1,134	890	2,542	NA
1985	5,000	5,770	3,800	1,300	1,243	14
1986	5,400	5,940	4,400	1,400	1,106	14

Additional food needs to support consumption for Philippines, with stock adjustment

Commodity and year	Commercial import capacity		Status quo		Nutrition-based	
	Quantity	Value	Quantity	Value	Quantity	Value
	1,000 tons	Million $	1,000 tons	Million $	1,000 tons	Million $
Cereal equivalent						
Consumption						
1985/86	687	105	857	131	1,250	190
1986/87	632	93	745	110	1,180	174
Stock adjustment						
1985/86	NA	NA	206	31	206	31
1986/87	NA	NA	145	21	145	21
Total						
1985/86	NA	NA	1,063	162	1,456	222
1986/87	NA	NA	890	131	1,325	195
Vegetable oils						
1985/86	12	9	0	0	0	0
1986/87	13	8	0	0	0	0
Total						
1985/86	NA	113	NA	162	NA	222
1986/87	NA	101	NA	131	NA	195

1/ Surplus vegetable oil import capacity offsets some additional cereal needs.

DOMINICAN REPUBLIC

Severe drought conditions developed in several primary agricultural areas of the Greater Antilles during March–July 1985. The Dominican Republic had short–term but severe shortages of traditional foods in local markets from April through September. The tropical storms that normally pass through the region from August through November returned on schedule and broke the drought in most of the primary agricultural producing areas. Favorable weather for the remaining months of this year may totally mask the effects of the earlier 6 months of adverse weather in annual production statistics because there are two or three harvests annually.

Nevertheless, the Dominican Republic is in an economic crisis because of severe long–term economic and financial constraints that have aggravated temporary food supply problems by slowing imports of needed production inputs. Longer–term social, political, and economic problems will continue to affect food production and trade capabilities.

The Dominican Republic data has changes in both the financial and agricultural production and trade series. In the financial section, imports and exports data were changed to include "other goods and services." Changes also result from the revisions of the agricultural production and trade estimates for fiscal years 1985 through 1987.

The Dominican Republic still has substantial need for imported food grains. The 1985/86 status quo cereal import requirements are calculated at 424,000 tons, compared with the July estimate of 338,000 tons. The status quo additional food needs to meet consumption requirements are revised from 26,000 tons to 57,000 tons. The nutrition–based needs increased from 53,000 to 140,000 tons.

Dominican Republic basic food data

Commodity/year	Actual or forecast production	Begin-ning stocks	Net imports	Nonfeed use	Feed use	Per capita total use	1979-81 Commodity coverage	1979-81 Share of diet
	1,000 tons					Kilos		Percent
Major cereals								
1980/81	265	44	337	390	180	100	Wheat	9.1
1981/82	284	76	380	440	195	109	Rice	20.8
1982/83	260	105	342	433	224	110	Corn	2.2
1983/84	330	50	440	477	309	128	Dry bears	3.5
1984/85	330	34	375	449	250	113	Cassava	1.7
1985/86	305	40	--	--	--	--	Plantains	8.6
1986/87	310	40	--	--	--	--	Bananas	3.6
							Milk	6.2
Roots							Total	55.7
1980/81	1,050	0	(10)	1,040	0	183		
1981/82	1,105	0	(21)	1,084	0	186		
1982/83	1,080	0	(12)	1,068	0	179		
1983/84	1,092	0	(26)	1,066	0	174		
1984/85	1,088	0	(25)	1,063	0	171		
1985/86	1,111	0	--	--	--	--		
1986/87	1,124	0	--	--	--	--		
Pulses								
1980/81	40	0	0	40	0	7		
1981/82	43	0	0	43	0	7		
1982/83	41	0	0	41	0	7		
1983/84	47	0	0	47	0	8		
1984/85	40	0	0	40	0	6		
1985/86	50	0	--	--	--	--		
1986/87	54	0	--	--	--	--		
Milk								
1980/81	350	0	0	350	0	61		
1981/82	350	0	0	350	0	60		
1982/83	352	0	0	352	0	59		
1983/84	353	0	0	353	0	58		
1984/85	350	0	0	350	0	56		
1985/86	350	0	--	--	--	--		
1986/87	350	0	--	--	--	--		

Import requirements for Dominican Republic

Commodity/year	Production	Total use		Import requirements		
		Status quo	Nutrition-based	Status quo	Nutrition-based	Maximum
		1,000 tons				
Major cereals						
1985/86	305	720	775	415	470	590
1986/87	310	791	848	481	538	605
Roots						
1985/86	1,111	1,143	1,110	32	(1)	86
1986/87	1,124	1,170	1,136	46	12	102
Cereal equivalent						
1985/86	614	1,038	1,077	424	463	592
1986/87	623	1,117	1,157	494	534	611
Pulses						
1985/86	50	46	58	(4)	8	(1)
1986/87	54	47	60	(7)	6	(3)
Milk						
1985/86	350	375	587	25	237	36
1986/87	350	384	600	34	250	46

Financial indicators for Dominican Republic, actual and projected

Year	Exports and other credits	Imports and other debits	Debt service	International reserves	Foreign exchange available	
					Total	Share to major food imports
	Million dollars					Percent
1980	1,313	2,171	157	202	1,156	8
1981	1,524	2,123	234	225	1,291	10
1982	1,146	1,793	260	129	886	10
1983	1,289	1,750	231	171	1,059	10
1984	1,350	1,700	146	109	981	NA
1985	1,200	1,675	204	115	967	10
1986	1,150	1,625	195	120	935	10

Additional food needs to support consumption for Dominican Republic, with stock adjustment and as constrained by maximum absorbable imports

Commodity/year	Commercial import capacity		Status quo		Nutrition-based	
	Quantity	Value	Quantity	Value	Quantity	Value
	1,000 tons	Million $	1,000 tons	Million $	1,000 tons	Million $
Cereal equivalent						
Consumption						
1985/86	323	47	57	8	140	20
1986/87	323	45	137	19	211	30
Stock adjustment						
1985/86	NA	NA	27	4	27	4
1986/87	NA	NA	23	3	23	3
Total						
1985/86	NA	NA	84	12	166	24
1986/87			159	22	234	33
Pulses						
1985/86	0	0	0	0	8	3
1986/87	0	0	0	0	6	2
Milk						
1985/86	7	9	0	0	14	20
1986/87	7	9	0	0	16	22
Total						
1985/86	NA	56	NA	12	NA	47
1986/87	NA	54	NA	22	NA	57
Maximum absorbable						
Cereal equivalent						
1985/86	NA	NA	84	12	133	19
1986/87	NA	NA	159	22	210	29
Pulses						
1985/86	NA	NA	0	0	0	0
1986/87	NA	NA	0	0	0	0
Milk						
1985/86	NA	NA	0	0	0	0
1986/87	NA	NA	0	0	0	0
Total						
1985/86	NA	NA	NA	12	NA	19
1986/87	NA	NA	NA	22	NA	29

1/ Surplus pulse import capacity offsets some additional cereal needs.

Reallocation of excess commercial import capacity assigned to the maximum absorbable level of additional grain imports adds to the quantity of pulses which may be imported, lowering the additional food need.

JAMAICA

Jamaica's production situation has been affected by basically the same weather factors as in the Dominican Republic. Agricultural production systems are similar in the two countries, but Jamaica is more dependent on food imports than the Dominican Republic.

Most of the changes in food needs and availabilities result from revisions in the financial data. The imports and exports data were changed to include "other goods and services", which include earnings from tourism and unrequited transfers from Jamacian workers living abroad. Changes also result from the revisions of the agricultural trade estimates for fiscal years 1985 through 1987. Jamaica still has substantial need for imported food grains.

Status quo import requirements are not changed from the July estimate. Status quo additional needs are 36,000 tons, compared with the earlier estimate of 115,000. The nutrition-based needs are revised to 9,000 tons, compared with the earlier estimate of 88,000. These diminished needs result from an $80-million increase in estimated commercial import capacity.

Jamaica basic food data

Commodity/year	Actual or forecast production	Begin-ning stocks	Net imports	Nonfeed use	Feed use	Per capita total use	1979-81 Commodity coverage	1979-81 Share of diet
	1,000 tons					Kilos		Percent
Major cereals								
1980/81	16	13	414	250	192	197	Wheat	22.2
1981/82	9	1	416	222	195	182	Rice	8.1
1982/83	10	9	416	231	195	183	Corn	2.4
1983/84	9	9	381	230	155	162	Yams & sweet potatoes	6.3
1984/85	7	14	402	252	157	169		
1985/86	9	14	--	--	--	--	Total	39.1
1986/87	9	14	--	--	--	--		
Roots								
1980/81	147	0	0	147	0	66		
1981/82	150	0	0	150	0	66		
1982/83	130	0	0	130	0	56		
1983/84	143	0	0	143	0	60		
1984/85	145	0	0	145	0	60		
1985/86	150	0	--	--	--	--		
1986/87	150	0	--	--	--	--		

Import requirements for Jamaica

Commodity/year	Production	Total use		Import requirements		
		Status quo	Nutrition-based	Status quo	Nutrition-based	Maximum
		1,000 tons				
Major cereals						
1985/86	9	430	401	421	392	443
1986/87	9	452	422	443	413	466
Roots						
1985/86	150	149	154	(1)	4	12
1986/87	150	157	161	7	11	21
Cereal equivalent						
1985/86	58	479	452	421	393	446
1986/87	58	503	474	445	416	472

Financial indicators for Jamaica, actual and projected

Year	Exports and other credits	Imports and other debits	Debt service	International reserves	Foreign exchange available	
					Total	Share to major food imports
	Million dollars					Percent
1980	1,422	1,678	201	105	1,221	9
1981	1,500	1,961	397	85	1,103	11
1982	1,371	1,925	259	109	1,112	8
1983	1,332	1,789	205	63	1,127	9
1984	1,360	1,797	286	97	1,003	NA
1985	1,350	1,875	251	50	1,060	9
1986	1,400	1,900	249	50	1,111	9

Additional food needs to support consumption for Jamaica, with stock adjustment

Commodity/year	Commercial import capacity		Status quo		Nutrition-based	
	Quantity	Value	Quantity	Value	Quantity	Value
	1,000 tons	Million $	1,000 tons	Million $	1,000 tons	Million $
Cereal equivalent						
Consumption						
1985/86	384	78	36	7	9	2
1986/87	417	81	28	6	0	0
Stock adjustment						
1985/86	NA	NA	1	0	1	0
1986/87	NA	NA	1	0	1	0
Total						
1985/86	NA	NA	37	7	10	2
1986/87	NA	NA	29	6	0	0

BOLIVIA

Food supplies have improved in Bolivia this year, as the 1985 harvest was substantially higher than those of the last 2 years. Surpluses in staples like wheat, rice, and corn will cover a shortfall in potato production. Bolivia may also have some short-term regional scarcities that could be eliminated by transporting basic staples from one area to another. Contraband trade between Bolivia and its neighbors (Peru, Chile, Argentina, and Brazil) may also develop if price differentials between countries are wide enough to facilitate trade. An increase in poultry production may also increase feed requirements.

Recent weather reports show that in parts of the western highlands, below-normal rainfall has resulted in an inadequate moisture base for early spring planting. The Altiplano is extremely dry. Consequently, some potato planting is likely to be delayed.

Bolivia's general economic situation is still untenable. Bolivia is in its third year of negative income growth and by July 1985, consumer prices were almost 15,000 percent higher than a year earlier. In an attempt to correct the economic difficulties, newly elected President Victor Paz Estenssoro's government froze salaries and initially freed prices on price-controlled items. After civil strikes, the government resumed some control over prices by listing "suggested retail prices" for basic foods.

Although Bolivia has maintained a positive trade balance, the balance of payments has deteriorated. In May 1984, Bolivia stopped repaying its debt to international banks, and several major U.S. banks have ceased operations in Bolivia. The Bolivian government is planning to ask international banks for a 10-year grace period to pay its arrears on interest. A delegation from IDB and AID is finalizing a $1-billion loan to Bolivia to be used by the government to relaunch its economy. Bolivia, like Peru, had increased foreign reserves in lieu of payment of foreign debt.

Compared with the July estimate, the following data changes have been made for 1985/86 and 1986/87. Corn production estimates have been increased to 540,000 and 550,000 tons respectively; wheat to 75,000 tons in both years, and rice to 132,000 tons in 1985/86. This is a net increase of 132,000 of grain production in 1985/86 and 95,000 tons in 1986/87 from the earlier forecast.

The value of 1984 exports was higher than the earlier estimate--$730 million--and imports were nearly the same--$415 million--resulting in a larger trade balance than earlier forecast. Foreign reserves are also higher than earlier anticipated: $252 million on December 31, 1984.

The larger crops are offset by increased import capacity (reflected by the trade balance and foreign reserves) resulting in about the same commercial import capacity of 237,000 tons in 1985/86 and 270,000 tons in 1986/87.

The status quo additional needs of zero portray the tradeoff between building up foreign reserves (which would tend to increase commercial import capacity) and the payment of foreign debt (which would be reflected in increased food aid needs.) Bolivia has chosen the former. Nutrition-based food needs, at 166,000 tons in 1985/86 and 168,000 tons in 1986/87, are reduced from the earlier forecast to reflect the increased grain crop but remain at a high level because of Bolivia's chronic shortage of calories.

Bolivia basic food data

Commodity/year	Actual or forecast production	Begin-ning stocks	Net imports	Nonfeed use	Feed use	Per capita total use	1979-81 Commodity coverage	1979-81 Share of diet
	1,000 tons					Kilos		Percent
Major cereals								
1980/81	509	77	261	529	225	141	Wheat	21.5
1981/82	642	93	151	461	360	150	Rice	5.2
1982/83	576	65	210	450	360	144	Corn	13.3
1983/84	420	41	294	422	310	127	Cassava	3.7
1984/85	694	23	250	506	410	156	Potatoes	8.2
1985/86	747	51	--	--	--	--	Total	51.8
1986/87	745	51	--	--	--	--		
Roots								
1980/81	1,006	0	0	1,006	0	188		
1981/82	1,180	0	0	1,180	0	215		
1982/83	1,124	0	0	1,124	0	200		
1983/84	442	0	0	442	0	77		
1984/85	940	0	0	940	0	160		
1985/86	1,026	0	--	--	--	--		
1986/87	1,072	0	--	--	--	--		

Import requirements for Bolivia

Commodity/year	Production	Total use: Status quo	Total use: Nutrition-based	Import requirements: Status quo	Import requirements: Nutrition-based	Import requirements: Maximum
	1,000 tons					
Major cereals						
1985/86	747	869	1,112	122	365	233
1986/87	745	890	1,137	145	392	257
Roots						
1985/86	1,026	983	1,169	(43)	143	271
1986/87	1,072	1,006	1,204	(66)	132	256
Cereal equivalent						
1985/86	1,020	1,131	1,423	112	403	268
1986/87	1,030	1,158	1,457	129	427	288

Financial indicators for Bolivia, actual and projected

Year	Exports and other credits	Imports and other debits	Debt service	International reserves	Foreign exchange available: Total	Foreign exchange available: Share to major food imports
	Million dollars					Percent
1980	942	680	288	106	654	6
1981	909	680	271	100	639	10
1982	828	429	260	156	568	9
1983	757	482	267	160	490	11
1984	730	415	321	252	480	NA
1985	700	400	191	252	627	10
1986	700	400	195	262	633	10

Additional food needs to support consumption for Bolivia, with stock adjustment

Commodity/year	Commercial import capacity: Quantity	Commercial import capacity: Value	Status quo: Quantity	Status quo: Value	Nutrition-based: Quantity	Nutrition-based: Value
	1,000 tons	Million $	1,000 tons	Million $	1,000 tons	Million $
Cereal equivalent						
Consumption						
1985/86	254	45	0	0	149	26
1986/87	266	45	0	0	162	28
Stock adjustment						
1985/86	NA	NA	4	1	4	1
1986/87	NA	NA	5	1	5	1
Total						
1985/86	NA	NA	0	0	152	27
1986/87	NA	NA	0	0	167	29
Maximum absorbable						
Cereal equivalent						
1985/86	NA	NA	0	0	14	2
1986/87	NA	NA	0	0	22	4

PERU

Peru's less-than-adequate economic growth and balance of payments problems continue to be the major factors affecting food aid needs. Food production has returned to the pre-El Nino levels and the newly elected Alan Garcia government is seeking to improve agricultural production through changes in agricultural policy. The Peruvian economy has continued to recover through mid-1985, with a 6.7-percent increase in real GDP forecast for 1985. But real GDP has not yet returned to the level of 1982. Per capita income is roughly equivalent to the levels of the mid-sixties. Peru has also experienced inflation problems: a 129-percent increase in the consumer price index from January to August, with 10-percent increases in July and August.

The balance of payments problems are overwhelming, but the trade balance will continue to be positive because of Peru's restrictive import policies. Prices for traditional mineral exports are still low and restricted entry to foreign markets limits the growth of exports of Peru's manufactured goods. Export earnings are not expected to rise significantly in 1985, but are buoyed by Peru's recent agreements to pay off debts to socialist countries in kind. In 1985, imports are also expected to increase only marginally in the face of the projected modest economic expansion.

Interest payments on foreign debt are coming up faster than the Government of Peru can deal with them. Alan Garcia has proposed that Peru limit payments on foreign debt to 10 percent of the export revenue over the next 12 months (about $320 million), with payment of loans from international organization like IDB and IBRD and U.S. PL 480 payments having first priority. Peru is also asking for a rollover in commercial bank loans. Currently, scheduled interest and principal payments amount to 140 percent of projected exports. The government is now more than 180 days behind on its interest payments, but is making token payments to avoid having its credit rating reduced to a value-impaired status. Peru's foreign debt now totals about $14 billion.

The newly introduced Peruvian agricultural policy "Agrarian Development and Agricultural Nourishments" is one of shifting from imported to domestically produced cereals. Measures to increase domestic food production include lowered interest rates on farm production (Jungle area--106 to 40 percent; coastal area--116 to 70 percent--all which may end up being negative real interest rates), subsidized seed and fertilizer prices, and improved extension services. To finance support operations a special duty will be collected on imports of wheat, corn, sorghum, oilseeds and products, and milk and dairy products. ENCI, the state food purchasing agency, will use money generated by these revenues to buy local farm produce. ENCI is also the only entity permitted to import these basic commodities, and will apply import quotas to wheat, soybean oil, and corn. Rice, however, will continue to be purchased by ECASA, the state-owned rice marketing company.

The new agricultural policy includes increased control of food prices. The government controls prices of rice, milk, and bread rolls to some degree. But the government is also adding other types of bread, pulses, pasta, vegetable oils and cooking fats, sorghum, poultry, other meats, and eggs. Feed corn prices are also expected to come under price control. The government will also provide a subsidy on consumer food prices, directed mainly to the lower-income population.

The outlook for agricultural production has not changed significantly. Dry weather has reduced available soil moisture in the Sierra in some districts. In August some locations in the north reported 50 percent of normal rainfall, while Cuzco and Ayacucho areas in the south continued with no significant rainfall. Overall moisture was probably inadequate for normal September plantings.

Comparison with July estimate

The following data changes are made for 1985/86 and 1986/87:

- The 1985/86 wheat production estimate was raised to 100,000 tons and corn to 770,000 tons.

- Peru's exports were raised to $3.4 billion for 1984, $3.5 billion for 1985, and $3.6 billion for 1986. Imports were changed to $2.14 billion, $2.2 and $2.3 billion respectively, reflecting a larger-than-anticipated trade balance.

- Foreign reserves on December 31, 1984, were larger than anticipated at $1.63 billion. The 1985 and 1986 reserves are currently forecast at $1.2 billion.

Despite the current despair in the Peruvian economy, last year's positive balance of trade and increased foreign reserves and this year's larger production of staples present a brighter picture than had been anticipated for 1985/86 and 1986/87.

Peru's commercial capacity to import grain is forecast at nearly 1.5 million tons in 1985/86 and 1.6 million tons in 1986/87, because of decisions to (1) build up foreign reserves rather than pay debt service, and (2) increase exports while cutting back imports. Status quo requirements for additional food in 1985/86 are nil but could reach 74,000 tons in 1986/87. But if Peru were to meet minimum nutritional needs for an adequate national diet (expressed here as nutrition-based needs) it would require 328,000 tons of grain in 1985/86 and 415,000 tons in 1986/87. While these estimates for nutrition-based needs are 365,000 tons lower than the July estimates, they reflect the continuing shortage of calories in the Peruvian national diet.

Peru basic food data

Commodity/year	Actual or forecast production	Begin-ning stocks	Net imports	Nonfeed use	Feed use	Per capita total use	1979-81 Commodity coverage	1979-81 Share of diet
	1,000 tons					Kilos		Percent
Major cereals								
1980/81	806	200	1,561	1,867	440	131	Wheat	17.7
1981/82	1,256	260	1,525	2,211	510	150	Rice	11.3
1982/83	1,205	320	1,389	1,954	580	136	Corn	9.7
1983/84	1,098	380	1,522	2,122	550	139	Potatoes	6.6
1984/85	1,375	328	1,319	1,877	800	136	Cassava	2.7
1985/86	1,370	345	--	--	--	--	Plantains	2.9
1986/87	1,220	345	--	--	--	--	Total	50.9
Roots								
1980/81	2,190	0	(50)	2,140	0	121		
1981/82	2,452	0	(50)	2,402	0	133		
1982/83	2,511	0	0	2,511	0	135		
1983/84	1,991	0	0	1,991	0	104		
1984/85	2,222	0	0	2,222	0	113		
1985/86	2,140	0	--	--	--	--		
1986/87	2,213	0	--	--	--	--		

Import requirements for Peru

Commodity/year	Production	Total use: Status quo	Total use: Nutrition-based	Import requirements: Status quo	Import requirements: Nutrition-based	Import requirements: Maximum
	1,000 tons					
Major cereals						
1985/86	1,370	2,846	2,877	1,476	1,507	1,709
1986/87	1,220	2,927	2,943	1,707	1,723	1,947
Roots						
1985/86	2,140	2,159	3,178	19	1,038	592
1986/87	2,213	2,231	3,272	18	1,059	598
Cereal equivalent						
1985/86	1,993	3,468	3,818	1,475	1,826	1,859
1986/87	1,864	3,571	3,912	1,707	2,048	2,097

Financial indicators for Peru, actual and projected

Year	Exports and other credits	Imports and other debits	Debt service	International reserves	Foreign exchange available: Total	Foreign exchange available: Share to major food imports
	Million dollars					Percent
1980	4,832	3,062	1,501	1,979	3,331	10
1981	4,213	3,802	1,895	1,199	2,318	14
1982	4,122	3,787	1,526	1,348	2,596	12
1983	3,825	2,722	754	1,365	3,072	13
1984	3,425	2,140	607	1,630	2,174	NA
1985	3,500	2,200	1,099	1,200	2,622	13
1986	3,600	2,300	1,089	1,200	2,688	13

Additional food needs to support consumption for Peru, with stock adjustment

Commodity/year	Commercial import capacity: Quantity	Commercial import capacity: Value	Status quo: Quantity	Status quo: Value	Nutrition-based: Quantity	Nutrition-based: Value
	1,000 tons	Million $	1,000 tons	Million $	1,000 tons	Million $
Cereal equivalent						
Consumption						
1985/86	1,625	273	0	0	201	34
1986/87	1,723	280	0	0	325	53
Stock adjustment	NA	NA				
1985/86	NA	NA	39	7	39	7
1986/87			21	3	21	3
Total						
1985/86	NA	NA	0	0	240	40
1986/87	NA	NA	6	1	347	56
Maximum absorbable						
Cereal equivalent						
1985/86	NA	NA	0	0	234	39
1986/87	NA	NA	6	1	347	56

*U.S. GOVERNMENT PRINTING OFFICE: 1985-490-920:20183-ERS

Glossary of terms

Status quo	Per capita food availability during 1981/82 -1984/85
Nutrition-based	Per capita food availability sufficient to meet internationally accepted minimum nutritional standards
Cereal equivalent	Cereal required to meet both cereal shortfalls and cereal equivalent (caloric basis) shortfalls in roots and tubers
Import requirement	Imports necessary to achieve either status quo or nutrition-based food availability, including both commercial and concessional food shipments
Tons	Metric tons
Dollars	U.S. dollars unless otherwise specified
GNP	Gross national product
GDP	Gross domestic product

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